



2020 Individual Income Tax Return Checklist

Income		Yes	\$
1. Salary or wages	GROSS		
2. Allowances, earnings, tips, director's fees etc.			
5. Australian Government allowances and payments like Newstart, Youth Allowance and Austudy payments			
6. Australian Government pensions and allowances			
7. Australian annuities and superannuation income streams			
8. Australian superannuation lump sum payments			
10. Gross Interest			
11. Dividends			
12. Employee share schemes			
13. Distributions from partnerships and/or trusts			
18. Capital gains			
20. Foreign source income (including foreign pensions) and foreign assets or property			
21. Rental property income and expense			
Have you renegotiated a loan during 2020?			
24. Other income (please specify below)			
Deductions		Yes	\$
D1. Work-related car expenses - has your vehicle changed?			
- how has your car use for work changed?			
- Cents per kilometre method (up to a maximum of 5,000 kms)			
- Registration Number			
- Log book method - Registration Number			
Have any car expenses been reimbursed by your employer?			
D2. Work-related travel expenses			\$
Employee without a reasonable travel allowance			
- Did you incur and have receipts for airfares; accommodation, hire car; meals & incidentals; other travel expenses?			
- If travel is for 6 or more nights in a row, do you have travel records? (e.g. a travel diary)			
Other work-related travel expenses (e.g., a borrowed car, public transport)			
<i>(Please specify)</i>			
Employee domestic travel with a reasonable travel allowance			\$
- If the claim is more than the reasonable travel allowance rate, do you have receipts for your expenses?			
Overseas travel with a reasonable travel allowance			\$
- Do you have receipts for accommodation expenses?			
Other work-related travel expenses (e.g., a borrowed car, public transport)			
<i>(Please specify)</i>			
D3. Work-related clothing, laundry and dry cleaning expenses			\$
Protective clothing			
Occupation specific clothing			
Non-compulsory uniform			
Compulsory uniform			
Laundry expenses (up to \$144 without receipts)			
Dry cleaning expenses			
Other claims such as mending/repairs, etc. (please specify)			
Have any clothing, laundry and dry cleaning expenses been reimbursed by your employer?			

D4. Work-related self-education expenses		\$
Course taken at educational institution:		
– Union fees (student)		
– Course fees		
– Books, stationery		
– Travel		
– Other (please specify)		
Have any self-education expenses been reimbursed by your employer?		
D5. Other work-related expenses		\$
Home office expenses (including working from home due to COVID-19)		
Computer and software		
Telephone/mobile phone		
Tools and equipment		
Subscriptions and union fees		
Journals/periodicals		
Depreciation - or items over \$300 each		
Sun protection products (i.e., sunscreen and sunglasses)		
Seminars and courses not at an educational institution		
Any other work related deductions (please specify)		
Have any other work-related expenses been reimbursed by your employer?		
Other types of deductions		\$
D7. Interest deductions		
D8. Dividend deductions		
D9. Gifts or donations		
D12. Personal superannuation contributions		
Full name of fund: Account no:		
Fund ABN: Fund TFN:		
– Have you provided the fund a notice of intention to deduct the contribution?		
– Has this notice been acknowledged by the fund?		
D15. Income Protection Insurance		
Have any amounts at D6 to D15 been reimbursed by your employer?		
Tax offsets/rebates		Yes \$
T1. Are you a senior Australian or a pensioner?		-
T3. Did you make superannuation contributions on behalf of your spouse?		
T5. Did you maintain a dependant who is unable to work due to invalidity or carer obligations in the 2020 income year?		-
Other relevant information – Please provide evidence		Yes \$
I. Did a trust or company distribute income to you in respect of which Family Trust Distribution Tax (FTDT) was paid by the trust or company?		
Other relevant information – Please provide evidence		Yes \$
Income tests information		
– Did you pay child support in the 2020 income year?		
– Number of dependent children?		
Spouse details (if applicable) – have your circumstances changed?		
Additional notes/concerns:		
Dated:		
.....		
<i>Signature of taxpayer</i>		
.....		
<i>Name (print)</i>		