2023 TAX RETURN CHECKLIST Bring this information to your 2023 tax interview

Applicable to me

INCOME	Yes	No
Salary and wages	()	()
Any other income including:	_ ` `	. ,
other allowances, benefits, earnings, tips, directors fees etc	_ ()	()
kilometre reimbursement for car expenses	_ ()	()
Eligible termination payments	_ ()	()
Newstart, Sickness or other Australian Government allowances	_ ()	()
Australian Government pensions and other allowances		()
Other Australian pensions or annuities		()
Personal services income	_ ()	()
Interest	_ ()	()
Dividends (amounts of franked, unfranked and imputation credits needed)	_ ()	()
Income from partnerships and/or trust	_ ()	()
Net income or loss from business	_ ()	()
Net farm management deposits or withdrawals	. ,	()
Sale of shares or real estate (other than place of residence)		()
Foreign income	_ ()	()
Rental income	_ ()	()
Bonuses from life assurance or friendly society policy	()	()
Other income including shares/ rights from an Employee Share Acquisition Scheme (after 12/5/09)	_ ()	()
Other income including compensation and insurance payments	()	()

DEDUCTIONS

Work related car expense claims:		
(please complete a travel diary & bring to interview)	()	()
Other work related travel expenses:		
(airfares, meals, accommodation, parking, tolls, fees etc)	()	()
Uniform/protective clothing expenses & dry cleaning	()	()
Self education expenses:		
student union fees	()	()
stationery	()	()
text books/journals		()
course fees	()	()
photocopying	()	()
travel	()	()
telephone	()	()
Other expenses: (* See diary pages)		
* home office exp or average no. of hrs. worked at home/week up until 28th Feb 2023		
From 1st March 2023 actual hours must be recorded in your diary	()	()
(complete home office use diary)		
* home office equipment and furniture purchased during year (include date purchased and amount) ()	()
telephone/mobile telephone (please complete telephone diary)	()	()
tools and equipment	()	()
subscriptions & union fees	()	()
journals, periodicals, books	()	()
undocumentable expenses (please complete undocumentable diary)	()	()
expenses in relation to allowances	()	()
seminars and conferences	()	()
(Please note - For energy, mobile home phone and internet expenses you must keep one monthly or qu	arterly bill)	
Income Protection Insurance	()	()
Interest & dividend expenses	()	()
Superannuation Full name of fund:	()	()
Fund ABN: Policy No Amount contributed \$		
Gifts of \$2 or more to eligible funds	()	()
Expenses relating to rental income	()	()

TAX OFFSETS

	From 1st March 2023 actual hours must be recorded in your diary	()	()
ш	(complete home office use diary)				
	* home office equipment and furniture purchased during year (include date purchased and amount) ()	()
U	telephone/mobile telephone (please complete telephone diary)	()	()
	tools and equipment	()	()
	subscriptions & union fees			()
	journals, periodicals, books			()
	undocumentable expenses (please complete undocumentable diary)	()	()
	expenses in relation to allowances	()	()
Z	seminars and conferences	()	()
	(Please note – For energy, mobile home phone and internet expenses you must keep one monthly or qu	arte	ərly bil	II)	,
LL	Income Protection Insurance			()
	_ Interest & dividend expenses			()
	Superannuation Full name of fund:	Ì)	Ì)
5	☐ Fund ABN: Policy No Amount contributed \$				
	O Gifts of \$2 or more to eligible funds)	()
	Expenses relating to rental income	()	()
)		-		-
\frown					
1.1	TAX OFFSETS				
		()	(١
	Invalid & invalid carer Senior & pensioner offset & self funded retirees	\tilde{i}			``
	Annuity & superannuation income stream	\tilde{i}		í	{
N	Superannuation contributions - on behalf of spouse	\tilde{i}	Ś	ì	Ś
	Zone or overseas forces	\tilde{i}	,)		``
	Private health insurance	())
		()	()

Name:

\$200 DIARY

Record business expenses for which you have not got receipts. Receipts are not required here. No single entry is to exceed \$10 and the total for the year **cannot** exceed \$200. At the end of the year, make sure you complete the summary box below.

DATE	NATURE OF EXPENSE	WHERE PURCHASED	COST	YOUR SIGNATURE
SUMMARY OF EXI Please summarise (eg. sun protection	PENDITURE your diary expenditure into the n, masks, tools, work materials, j	various expense categories: journals).	L	I
		Category:		\$
				\$ \$
				\$
				\$

EEDOM FINANCE

EQUIPMENT USE DIARY

Use this diary to establish the percentage of business use for equipment used for both business and private purposes. This diary need only be kept for a consecutive four week period. It should only be used for major cost items of equipment (e.g. computers).

(Note: if you spent time in home office without the use of equipment please complete "Home Office Use Diary" below).

DATE	HOURS EQUIPMENT USED FOR BUSINESS Column 2		HOURS EQUIPMENT USED FOR PRIVATE Column 3		TOTAL HOURS EQUIPMENT USED (Add Columns 2&3)	
	Hour	Min	Hour	Min	Hour	Mins
OTALS	T2		тз		T4	

Calculation Box Business Use % = <u>T2 x 100</u> **T**4

Business Use =

%

HOME OFFICE USE DIARY

You are able to claim heat and light of home office by using a standard rate of 67¢/hr. Use this diary to record your home office usage for a representative one month period up to 28th Feb 2023. Actual hours to be recorded from 1st March 2023 (Note: if you used home office equipment during the year please complete "Equipment Use Diary" above).

1

DATE	NO. OF HOURS WORKED	DESCRIPTION OF DUTIES UNDERTAKEN
TOTAL HOURS		

LOG BOOK – MOTOR VEHICLE

Use this log book where your total business travel is more than 5,000 kms per year. Keep the log book for a representative <u>13 week consecutive</u> period, and record only <u>business</u> travel. Remember that whilst the log book may apply for a maximum of 5 years that you own the same vehicle, you must still record the odometer reading at the <u>beginning</u> and <u>end</u> of <u>each</u> year.

	CAR MAKE:		MODEL:			REGISTRATION NO:			
DATE	FULL DETAILS OF JOURNEY	ODOMETER AT START	ODOMETER AT END	TOLL FEE	PARKING METER MONEY	TOTAL BUSINESS KM*S TRAVELLED	DRIVER'S NAME		
		-							
		_							
					TOTAL				

EEDOM FINANCE

TELEPHONE DIARY

Record your business telephone calls for a consecutive four week period. This will establish the percentage of your actual telephone bill for the same period that you can claim as a tax deduction. (Use the internet usage diary below for internet calls).

DATE	NAME OF PERSON CALLED	PURPOSE OF CALL	COST OF CALL	SIGNATURE
		TOTAL	\$	

INTERNET USAGE DIARY

actual interi	r business internet usage for a cons net bill for the same period that yo elephone calls).			
DATE	SITE ADDRESS	PURPOSE	COST	SIGN
		ТОТ	AL \$	-

TRAVEL DIARY

Use this diary where your total business travel is less than 5,000 km per year. Complete the diary for the full year and only record business travel.

CAR MAKE:	MODEL:	REGISTRATION NO:

TRAVEL DIARY - REGULAR TRIPS

DATE	DESTINATION	PURPOSE OF TRIP	TOLL FEE	PARKING METER MONEY	NO. OF KMS TRAVELLED	YOUR SIGNATURE
	·	·		TOTAL		

TRAVEL DIARY - IRREGULAR TRIPS

	DATE	DESTINATION	PURPOSE OF TRIP	TOLL FEE	PARKING METER MONEY	NO. OF KMS TRAVELLED	YOUR SIGNATURE
\mathbf{O}							
7							
$\sum_{i=1}^{n} \overline{i}_{i}$							
$\mathbf{O}_{\mathbf{U}}^{\mathbf{U}}$							
FREE							
Īīī							
2							
					TOTAL		

UNDOCUMENTABLE EXPENSES DIARY

Record here expenditure on expenses where, because of their nature, you cannot obtain documentary evidence (eg. parking meter money, coin in the slot photocopying, public box telephone calls). There is no limit on expenditure other than what you record in this diary and what the Australian Taxation Office considers reasonable for your circumstances.

DATE NATURE OF EXPENSE WHERE INCURRED COST YOUR SIGNATURE Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature Image: Signature	
Image: Second	
Image: Constraint of the second sec	
TOTAL \$	