

2023 TAX RETURN CHECKLIST

Bring this information to your 2023 tax interview

INCOME

Applicable to me

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 quarterly 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

Invalid & invalid carer _____	()	()
Senior & pensioner offset & self funded retirees _____	()	()
Annuity & superannuation income stream _____	()	()
Superannuation contributions - on behalf of spouse _____	()	()
Zone or overseas forces _____	()	()
Private health insurance _____	()	()

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.

[illegible]

Category: _____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
	<hr/>
	\$ _____

Name:

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
TOTALS	T2		T3		T4	

Calculation Box Business Use % = $\frac{T2}{T4} \times \frac{100}{1}$ 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).

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

LOG BOOK – MOTOR VEHICLE

Odometer reading: Odometer reading:

CAR MAKE:		MODEL:	REGISTRATION NO:

TOTAL

Name:

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

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

DATE	SITE ADDRESS	PURPOSE	COST	SIGNATURE
TOTAL			\$	

FREEDOM FINANCE

ACCOUNTING

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.

TOTAL	\$
--------------	-----------