2024 TAX RETURN CHECKLIST

Bring this information to your 2024 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		()
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	()	()
student union fees	()	()
stationery		()
text books/journals		()
course fees	. ,	()
photocopying	. ()	()
travel		()
telephone	()	()
Other expenses: (* See diary pages)		
* Home office hrs (complete home office use diary).	, ,	, ,
Work at home from 1st July 2023 actual hours must be recorded in your diary		()
* Home office equipment and furniture purchased during year (include date purchased and amour 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 que		
Income Protection Insurance		()
Interest & dividend expensesSuperannuation Full name of fund:	()	()
Superannuation Full name of fund:	()	()
Fund ABN:Policy No Amount contributed \$		()
Gifts of \$2 or more to eligible funds Expenses relating to rental income	- ()	()
Expenses relating to rental income	. ()	()
TAX OFFSETS		
Invalid & invalid carer	()	()
Invalid & invalid carerSenior & pensioner offset & self funded retirees	- () - ()	()
Annuity & superannuation income stream	()	()
Superannuation contributions - on behalf of spouse	_ ()	()
Zone or overseas forces	. ()	()
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	COSI	YOUR SIGNATURE	
	<u> </u>				
SUMMARY OF EXPENDITURE Please summarise your diary expenditure into the various expense categories: (eg. sun protection, masks, tools, work materials, journals).					
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		Category:		\$ \$	
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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		FOR BUSINESS FOR PRIVATE		TOTAL HOURS EQUIPMENT USED (Add Columns 2&3)	
	Hour	Min	Hour	Min	Hour	Mins
			-			
TOTALS	T2		Т3		T4	

Calculation Box Business Use $\% = \frac{T2}{T4} \times \frac{100}{4}$

T4 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. Actual hours to be recorded from 1st July 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		

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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.

Odometer reading:	 Odometer reading:	

CAR MAKE:		MODEL:	R	EGISTRATION 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
		<u> </u>			TOTAL		

Name:	
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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
			ф	

TOTAL | \$

Nan	ne:					
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TRAVEL DIARY

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

TOTAL _____

Name:	
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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 WHERE EXPENSE INCURRED		COST	YOUR SIGNATURE	
		TOTAL			