2025 TAX RETURN CHECKLIST

Bring this information to your 2025 tax interview

Applicable to me

BICOME	Аррисар	pie to m
INCOME	Yes	No
Salary and wages	()	()
Any other income including:		
Any other income including:	()	()
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	Ì)	()
Self education expenses:			. ,
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 2024 actual hours must be recorded in your 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)	()	()
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 qua		y 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

Ш	Work at home from 1st July 2024 actual hours must be recorded in your diary	nt) _ ()	() ()
	subscriptions & union fees	_ () _ () _ () _ () uarterly bill) _ () _ () _ ()	<pre>() () () () () () () () () ()</pre>
FREEC →	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	_ () _ () _ ()	() () () () ()

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,	various expense categories: journals).		
		Category:		\$
				\$ \$
				\$
				\$

JIPMENT USE DIARY E(

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 EQUIP FOR PRI Colun	VATE	TOTAL HOURS EQUIPMENT USED (Add Columns 2&3)	
	Hour	Min	Hour	Min	Hour	Mins
OTALS	T2		ТЗ		T4	

x 100 Calculation Box Business Use % = <u>T2</u> **T4**

Business Use =

%

HOME OFFICE USE DIARY

You are able to claim heat and light of home office by using a standard rate of 70¢/hr. Use this diary to record your home office usage. Actual hours to be recorded from 1st July 2024.

(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 WORKED		

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:			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

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
L	1	TOTAL	\$	J

INTERNET USAGE DIARY

actual interr		secutive four week period. This will e u can claim as a tax deduction. (Us		
DATE	SITE ADDRESS	PURPOSE	COST	SIGNA
		ТОТА	L \$	

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

DESTINATION	PURPOSE OF TRIP	TOLL FEE	PARKING METER MONEY	NO. OF KMS TRAVELLED	YOUR SIGNATURE
	DESTINATION	DESTINATION PURPOSE OF TRIP	DESTINATIONPURPOSE OF TRIPTOLL FEEImage: Image:		

TOTAL

TRAVEL DIARY - IRREGULAR TRIPS

	DATE	DESTINATION	PURPOSE OF TRIP	TOLL FEE	PARKING METER MONEY	NO. OF KMS TRAVELLED	YOUR SIGNATURE
III.							
$\sum_{i=1}^{z}$							
\sim \circ							
Щ							
Ш							
FRE							
					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
		TOTAL	¢	