

INDIVIDUAL TAX CHECKLIST (wage & salary earner)

Client Name:

Appointment date/time [Office only]:

Please complete before your appointment

Assessable Income:-

- PAYG Summaries (Group Certificates - including Centrelink, Youth Allowance, Pensions & Child Support)
- Eligible termination payments
- Interest received
- Dividends received
- Trust distributions from investments
- Any assets sold that may generate a capital gain
- Details of any overseas income

N/A

Encl

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Allowable Employment Deductions - please bring proof of purchase:-

- Motor vehicle travel (either km travelled or log book)
- Other related travel including train fares and toll charges
- Uniform (logo's) purchased and/or protective clothing
- Self education expenses relating to your employment
- Union fees
- Meals – if you receive a meal allowance (this may not be detailed on your PAYG Summary, so LBW requires further evidence)
- Subscriptions, conference and seminars
- Tools purchased for work usage
- Home office, mobile usage (please provide evidence)
- Other work related expenses such as sun protection
- Donations
- Income protection/sickness and accident insurance
- Tax Agent fees for prior year (including Audit Insurance costs)

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Medicare Levy Related Items:-

- Your 2020 Private Health Statement

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Note:

Medical offset has been completely phased out effective 30/06/2019.

Please insert your Banking Details

Have your **BSB** and **Bank Account Number** changed?

BSB: Account Number:

Please provide your **Email Address** below to update our system and to allow secure document transfers through the LBW Client Portal.

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2020 Income Tax Return