



Ample Finance Group Pty Ltd
(T/as Ample Finance)
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2018 Individual Tax Return Checklist

To assist us in preparing your tax return, please use this checklist when compiling your information. Completing the checklist can take some time however your efforts will enable us to maximise your deductions and process your return efficiently.

For New Client Only /
For Information Update Only

PERSONAL DETAILS				
Name				
TFN				
ABN				
Address				
Postal (if different)				
Contact Numbers	Mobile		Home	
	Work		Fax	
Email Address				
Date of Birth				
Occupation				
Were you a Working Holiday Maker? (Visa 417 or Visa 462)	Yes / No			

SPOUSE & CHILD DETAILS		
Spouse (if we don't prepare their tax return)	Name	
	Date of Birth	
	Taxable Income	
Names of any dependent children	Date of Birth	Name

BANK ACCOUNT			
Account Name			
BSB		Account	

Are you able to supply a copy of your previous year's tax return?	Yes / No	
Details of your last Tax Agent:	Name:	
	Contact Number:	
	Email:	

For All Clients

INCOME		
Have you received any of the following payments?		Documents Required
Gross salary/wages	Yes / No	PAYG payment summary / Last Payslip of the Financial Year
Allowances, earnings, tips, director's fees etc	Yes / No	PAYG payment summary / Last Payslip of the Financial Year / Details of payments that you received that are not shown on a payment summary or comparable statement
Employer lump sum payments	Yes / No	PAYG payment summary / Last Payslip of the Financial Year
Employment termination payments	Yes / No	PAYG payment summary – employment termination payment
Australian Government allowances and payments like newstart, and austudy	Yes / No	PAYG payment summary / a letter from the agency that paid your allowance or payment stating the amount you received
Australian Government pensions and allowances	Yes / No	PAYG payment summary / a letter from the agency that paid your allowance or payment stating the amount you received
Australian annuities and superannuation income streams and pensions	Yes / No	PAYG payment summary – individual non-business / superannuation income stream
Australian superannuation lump sum payments	Yes / No	PAYG payment summary – superannuation lump sum
Attributed personal services income	Yes / No	PAYG payment summary – business and personal services / Details of any other personal services income attributed to you
Interest	Yes / No	Statements, passbooks and other documentation from your financial institutions
Dividends	Yes / No	Dividend Statement
Employee share schemes	Yes / No	Employee share scheme statement
Distributions from partnerships and/or trusts	Yes / No	Statement of Distribution
Net income or loss from business	Yes / No	
Capital gains, ie sale of shares	Yes / No	Details of any assets sold. This includes dates and values of acquisitions and disposals, as per purchase and sale documents.

Foreign source income	Yes / No	Foreign tax assessments, PAYG payment summary – foreign employment / Distribution advices from companies, partnerships and trusts / Details of any expenses you incurred in earning your foreign income
Rent (please complete rental checklist)	Yes / No	All rental income earned / Interest charged on money you borrowed for the rental property / Other expenses relating to your rental property / Any expenditure on capital works to your rental property.
Any other income not listed above (please specify)	Yes / No	
Comments or Questions:		

DEDUCTIONS		
Have you incurred any of the following for work? (remember you will need to keep records to substantiate)		Documents Required
Work related car expenses (one of the following):	Yes / No	Written evidence for your car expenses (receipts, invoices or diary entries) / your car logbook and odometer records.
cents per kilometre method (up to a maximum of 5,000 kms)		
If you travel more than 5,000km for work then you must use the log book method		To claim please complete the motor vehicle checklist
Work related travel expenses, ie taxi's	Yes / No	Written Evidence
Work related uniform and protective clothing expenses	Yes / No	Receipts / invoices, or other written evidence (such as diary records)
Work related self-education expenses	Yes / No	Written Evidence
Other work related expenses:		PAYG payment summary – individual non-business / – foreign employment / Statements from your bank, building society or credit union / Receipts, invoices or written evidence from your supplier or association other written evidence
Telephone / mobile phone / Internet Access	Yes / No	Receipts / invoices, or other written evidence (such as diary records)
Tools and equipment	Yes / No	Receipts / invoices, or other written evidence (such as diary records)
Subscriptions and union fees	Yes / No	Receipts / invoices, or other written evidence (such as diary records)
Computer and software	Yes / No	Receipts / invoices, or other written evidence (such as diary records)
Journals / periodicals	Yes / No	Receipts / invoices, or other written evidence (such as diary records)

Sun protection products (i.e., sunscreen and sunglasses)	Yes / No	Receipts / invoices, or other written evidence (such as diary records)
Seminars / Conferences / Courses	Yes / No	Receipts / invoices, or other written evidence (such as diary records)
Home office expenses	Yes / No	Receipts / invoices, or other written evidence (such as diary records)
Other types of deductions:		
Interest deductions	Yes / No	Bank or financial institution statements or passbooks
Dividend deductions	Yes / No	Dividend statements showing any LIC capital gain amount.
Gifts or donations	Yes / No	Written Evidence
Cost of managing tax affairs	Yes / No	Receipts / invoices, or other written evidence
Income Protection Insurance	Yes / No	Copy of Income Protection Insurance Policies
Personal superannuation contributions	Yes / No	Notice of Intent to Claim with letter of acceptance from your superannuation fund where you have made a contribution that is being claimed as a deduction
Comments or Questions:		

OTHER

		Amount / Details / Documents Required
Have you lived in a remote or isolated area of Australia? (Where and how long)	Yes / No	
Do you have a dependent parent?	Yes / No	
Did you or your spouse receive FTB through the Family Assistance Office ?	Yes / No	
Did you have private health insurance 'Hospital Cover'?	Yes / No	Private Health Insurance Statement
Did you make superannuation contributions on behalf of your spouse?	Yes / No	
Do you have a HELP liability or a student financial supplement loan debt?	Yes / No	
Medical Expenses, please note these have changed. From 1 July 2016 you can only include medical expenses relating to disability aids and aged care.	Yes / No	
Comments or Questions:		

I declare that:

- The information I am submitting via this form and other information provided to Ample Finance for the preparation of my tax return is true and correct.

- All income declared, claims for deductions and tax offsets/rebates included in my return are based on my specific instructions and advice that I satisfy the relevant taxation requirements.
- This is a complete account of all sources of income, including net capital gains, and expenses derived during the financial year.
- I have provided all necessary and relevant information regarding my income and expenses from all sources in and out of Australia.
- I have the evidence to support the claims made in this form and my tax return.
- The requirements of the substantiation provisions as they apply to expenses, deductions and claims made in the returns have been explained to me and I have all the required documents to support these expenses, deductions and claims.
- I accept that Ample Finance Group Pty Ltd are not in any way responsible where I provide incorrect bank account details.

Signature

Date
