



EDEN

wealth accountants

TAX CHECKLIST

Name(s): _____

> *Personal*

Please complete, attach supporting paperwork, and:
- Mail to PO Box 99, Canterbury VIC 3126;
- Visit us at Suite 1, 235 Camberwell Road, Hawthorn East VIC 3126; or
- Scan and email to Admin@EdenWealth.com.au

Think about using our Wealth Management service to potentially **save you money** on next year's tax bill, and to potentially receive a **larger tax refund**.

Ask your Wealth Accountant for an introduction or visit us online at www.edenwealth.com.au.

Tell us a little about You ...

Your Details

Spouse/Partner Details

Name:	_____	_____
DOB:	_____	_____
TFN:	_____	_____
Address:	_____	_____
	_____	_____
Phone:	_____	_____
Mobile:	_____	_____
Email:	_____	_____
Job Description / Title:	_____	_____
Taxable income from PAYG Summary(ies):	_____	_____
Do you have children?	Yes / No	_____
If yes, how many and what ages?	_____	_____

How were you introduced to Eden Wealth Accountants?

_____	_____
_____	_____

If you would like your refund deposited directly into your bank account then please provide your account details below.

Name of Bank:	_____	_____
Account Name:	_____	_____
BSB:	_____	_____
Account Number:	_____	_____

Eden Wealth Accountants – Personal Tax Return Checklist

Personal

INCOME	YES	NO	COMMENTS
PAYG summaries from all employers? [inc. Fringe Benefits]	<input type="checkbox"/>	<input type="checkbox"/>	
Did you resign or leave from any employment during the year? If so, all documentation should be provided including an ETP Payment Summary from the employer or fund.	<input type="checkbox"/>	<input type="checkbox"/>	
Did you receive or exercise any employee shares/options during the year? Please provide details - e.g. date exercised, units exercised, exercise price etc.	<input type="checkbox"/>	<input type="checkbox"/>	
Did you withdraw money from superannuation during the year? If so, all documentation should be provided including the Payment Summary from the fund.	<input type="checkbox"/>	<input type="checkbox"/>	
Did you receive a Newstart Allowance, Youth Allowance, Single Mother Pension, or any other cash benefits from Centrelink?	<input type="checkbox"/>	<input type="checkbox"/>	
Do you own shares in public companies and did you receive any dividend income from those shares? Please provide all dividend statements.	<input type="checkbox"/>	<input type="checkbox"/>	
Details of any money invested in bank accounts, or managed funds? Please provide all relevant paperwork, including annual tax summaries.	<input type="checkbox"/>	<input type="checkbox"/>	
Details of distributions received from listed property trusts (e.g. Westfield, Bunnings)? Please provide annual tax summaries.	<input type="checkbox"/>	<input type="checkbox"/>	
Do you own investment property? Please complete the property investment schedule.	<input type="checkbox"/>	<input type="checkbox"/>	
Have you sold any major assets (e.g. shares, property, businesses)? Please complete the sale of assets schedule.	<input type="checkbox"/>	<input type="checkbox"/>	
Do you operate a business and have business income? Please complete the business tax checklist.	<input type="checkbox"/>	<input type="checkbox"/>	
Other income receipts/minutes – private/family trust distributions, private company dividends.	<input type="checkbox"/>	<input type="checkbox"/>	
Foreign source (employment and pension) income and details of any foreign tax credits.	<input type="checkbox"/>	<input type="checkbox"/>	

Eden Wealth Accountants – Personal Tax Return Checklist

Personal

DEDUCTIONS	YES	NO	COMMENTS
Investment property expenses? Please complete the property investment schedule.	<input type="checkbox"/>	<input type="checkbox"/>	
Do you have, or have you recently discharged, any loan/lease/hire-purchase facilities related to the purchase of investment assets? If so, please provide statements outlining interest charges and other costs. Also please provide original contract details including establishment costs.	<input type="checkbox"/>	<input type="checkbox"/>	
Receipts for all employment related expenses such as, self-education, protective clothing and uniform expenses, tools of trade, subscriptions, computer hardware, computer software, telephone, taxis? If working outdoors sunscreen, hats and sunglasses?	<input type="checkbox"/>	<input type="checkbox"/>	
Do you perform work related tasks from home? If so please provide an estimate of the average number of hours per week spent on work related matters.	<input type="checkbox"/>	<input type="checkbox"/>	
Do you maintain a separate home office distinctive from the rest of the house? If so please provide an estimate of the % floor space occupied in relation to the whole residence. Also provide receipts/schedules for Gas / Electricity / Water expenses.	<input type="checkbox"/>	<input type="checkbox"/>	
For telephone, internet, equipment or other expenses for which personal and work-related use may apply, please advise what % of the expense is work related as opposed to personal.	<input type="checkbox"/>	<input type="checkbox"/>	
Did you use your Car for work related tasks other then driving to & from work? If so complete the car expense worksheet.	<input type="checkbox"/>	<input type="checkbox"/>	
Have you made any Charitable Donations?	<input type="checkbox"/>	<input type="checkbox"/>	
Do you have "carried forward Capital Losses" from previous asset sales?	<input type="checkbox"/>	<input type="checkbox"/>	
Do you have Income protection insurance? Please provide details.	<input type="checkbox"/>	<input type="checkbox"/>	
Financial planning fees, previous year tax agent/accounting fees?	<input type="checkbox"/>	<input type="checkbox"/>	

Eden Wealth Accountants – Personal Tax Return Checklist

Personal

REBATES & OFFSETS	YES	NO	COMMENTS
Do you have private health cover? Please provide the private health insurance end of year tax statement for you and your family.	<input type="checkbox"/>	<input type="checkbox"/>	
Did you incur out of pocket medical expenses in excess of \$1,500? (Out of pocket medical expense is total medical expenses less private health insurance rebates & Medicare). If yes please provide receipts of expenses and rebates from your health insurer and Medicare.	<input type="checkbox"/>	<input type="checkbox"/>	
Education refund: Do you have children in primary or secondary school? If so you may be entitled to a deduction for costs associated with educating you children: Laptop or home computer equipment, Internet, educational software, utility software or text books & stationery.	<input type="checkbox"/>	<input type="checkbox"/>	
Spouse Super Contribution: Did you make a contribution to superannuation on behalf of your spouse? If so how much did you contribute.	<input type="checkbox"/>	<input type="checkbox"/>	
What other rebates have you received in the past? (e.g. family tax benefit, child care benefit etc)	<input type="checkbox"/>	<input type="checkbox"/>	
OTHER			
Please provide last year's tax return (unless prepared by Eden Wealth Accountants).	<input type="checkbox"/>	<input type="checkbox"/>	
Do you have a HECS/HELP debt? If so please provide you most recent HECS/ HELP Statement.	<input type="checkbox"/>	<input type="checkbox"/>	
Personal Super Contributions: Did you or your partner make any contributions to superannuation? If so how much did you contribute.	<input type="checkbox"/>	<input type="checkbox"/>	
Other Deductions: Are there any other expenses you incurred during the year in which you believe a deduction is allowable? Be it hearsay from a friend, posted on the internet or a voice that spoke to you in your sleep. Please provide details of the expense, including the receipt and a description of how it connects to your employment.	<input type="checkbox"/>	<input type="checkbox"/>	

Eden Wealth Accountants – Personal Tax Return Checklist

Personal

CAR EXPENSE WORKSHEET

YES NO

Did you use your Car for work related tasks other than driving to & from work?

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Motor Vehicle Registration Number:

Motor Vehicle Make & Model:

Purchase Date:

Purchase Price:

Work Related Kilometers Traveled:

YES NO

Was a logbook maintained for 12 consecutive weeks? If so please provide.

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Was vehicle purchased via Hire Purchase agreement? If so please provide **purchase & financing documentation** or **Hire Purchase schedule**.

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If purchase was financed via bank loan please provide **bank statements** for the year so interest paid can be calculated.

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Fuel Expenditure for the year:

[please provide schedule of receipts]

Registration:

Insurance:

Repairs & Servicing:

Other Expenditure:
