

# Income Tax Checklist 2023

Please tick all items that are relevant to you during the period 1 July 2022 to 30 June 2023.

Full Name: \_\_\_\_\_

Income	
<input type="checkbox"/>	Income earned from employment
<input type="checkbox"/>	Bank interest earned from an Australian bank account
<input type="checkbox"/>	Receipt of any Government pensions (e.g. age pension, jobseeker, disability)
<input type="checkbox"/>	Ownership of private or public shares, including any purchases or sales during the year
<input type="checkbox"/>	Investment in managed investments/funds
<input type="checkbox"/>	An interest in or investment in any partnerships or other trusts
<input type="checkbox"/>	Holdings (including any purchases, trades or sales) of cryptocurrency
<input type="checkbox"/>	Ownership of any foreign assets
<input type="checkbox"/>	Foreign income earned (e.g. investment properties, pensions, bank interest, business income)
<input type="checkbox"/>	Income earned from running a business
<input type="checkbox"/>	Investment property ownership
<input type="checkbox"/>	Income earned from renting part or all of your home (including on a short-term basis)
<input type="checkbox"/>	Participation in ride share activities (e.g. Uber)
<input type="checkbox"/>	Other income – <i>please provide details</i> _____
Expenses/Deductions	
<input type="checkbox"/>	Personal superannuation contributions – Do you have confirmation from your super fund? YES NO
<input type="checkbox"/>	Tax deductible donations
<input type="checkbox"/>	Work related motor vehicle use
<input type="checkbox"/>	Worked from home
<input type="checkbox"/>	Work related mobile phone use
<input type="checkbox"/>	Uniform costs (with a registered logo) and/or protective clothing (e.g. steel cap boots, aprons, hats)
<input type="checkbox"/>	Union fees
<input type="checkbox"/>	Professional memberships or subscriptions
<input type="checkbox"/>	Work related education costs or seminars
<input type="checkbox"/>	Work related tools/equipment
<input type="checkbox"/>	Any other work-related expenses
<input type="checkbox"/>	Tax agent fees (excluding Desborough Accountant fees)
<input type="checkbox"/>	Income protection insurance (does not include insurance within your superannuation fund)
<input type="checkbox"/>	Lived in a remote area of Australia
<input type="checkbox"/>	Moved overseas to live or returned from overseas to live in Australia.
<input type="checkbox"/>	Other expenses/deductions – <i>please provide details</i> _____
Other Information – please answer the following questions	
<input type="checkbox"/>	➤ Were there any changes to your relationships with dependents during the year (e.g. a new spouse, separation, new children born, adult children left home)? YES NO
<input type="checkbox"/>	➤ Were all your dependents (spouse and children) covered by private hospital cover for the full financial year? YES NO
<input type="checkbox"/>	➤ Please confirm your bank account details for any ATO refunds:
BSB _____	Account Number _____ Account Name _____

Please see our "What To Provide" document for details on what other information we will require from you.