

# Tax Return

## Appointment Checklist

### Your Details

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

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

### Appointment Details

Date: \_\_\_\_\_

Time: \_\_\_\_\_

### What to bring

To help you prepare for your appointment, please complete this checklist and collate your records and receipts accordingly.

#### 1. Essentials

- ☐ Drivers licence / photo ID
- ☐ Employer payment summaries
- ☐ Bank details

#### 2. Other items (as applicable)

- ☐ Previous years Notice of Assessment
- ☐ Details of spouse's income and date of birth
- ☐ Motor vehicle logbook
- ☐ Details of bank interest received
- ☐ Share investment information
- ☐ Private health insurance annual statement
- ☐ Tax agent fees
- ☐ Details of other income and earnings

#### 3. Rental property details (if applicable)

- ☐ Details of income received
- ☐ Interest paid (from bank statements)
- ☐ Rates and land tax
- ☐ Insurance / body corporate fees
- ☐ Repairs and maintenance
- ☐ Agents fees

#### 4. Expense receipts (as applicable)

- ☐ Car (fuel, oil, repairs, interest)
- ☐ Donations
- ☐ Home office (equipment, curtains, utilities, depreciation)
- ☐ Equipment insurance premiums
- ☐ Interest and dividend deductions
- ☐ Work / investment related journals and publications
- ☐ Professional association, Union fees
- ☐ Rental costs (advertising, rates, repairs, cleaning)
- ☐ Self education (course fees, books, copying, stationery, travel)
- ☐ Seminars / conferences / in-services
- ☐ Telephone (calls and rental charges)
- ☐ Tools of trade (depreciation, insurance, repairs, replacement)
- ☐ Travel (air, bus, taxi fares, accommodation, meals)
- ☐ Uniforms and protective clothing (purchased, rental, laundry)
- ☐ Other

# 70 ways to boost your tax refund

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Accounting fees                          | <input type="checkbox"/> Gardening                             | <input type="checkbox"/> Stationery (diaries, log books etc.) |
| <input type="checkbox"/> Advertising                              | <input type="checkbox"/> Garbage removal                       | <input type="checkbox"/> State taxes                          |
| <input type="checkbox"/> Agents fees                              | <input type="checkbox"/> Glasses and goggles (protective)      | <input type="checkbox"/> Storage                              |
| <input type="checkbox"/> Bank account fees and debits charges     | <input type="checkbox"/> Heating                               | <input type="checkbox"/> Subcontractors                       |
| <input type="checkbox"/> Body corporate fees                      | <input type="checkbox"/> Hire                                  | <input type="checkbox"/> Subscriptions                        |
| <input type="checkbox"/> Books and magazines                      | <input type="checkbox"/> Home office                           | <input type="checkbox"/> Sunscreen                            |
| <input type="checkbox"/> Borrowing expense                        | <input type="checkbox"/> Interest                              | <input type="checkbox"/> Superannuation                       |
| <input type="checkbox"/> Business trips                           | <input type="checkbox"/> Insurance premiums                    | <input type="checkbox"/> Tax preparation / advice             |
| <input type="checkbox"/> Calculators / organisers                 | <input type="checkbox"/> Land tax                              | <input type="checkbox"/> Taxi fares                           |
| <input type="checkbox"/> Capital items less than \$300            | <input type="checkbox"/> Lease payments                        | <input type="checkbox"/> Tools                                |
| <input type="checkbox"/> Car expenses                             | <input type="checkbox"/> Legal expenses                        | <input type="checkbox"/> Trade journals                       |
| <input type="checkbox"/> Commission                               | <input type="checkbox"/> Levies                                | <input type="checkbox"/> Travel costs                         |
| <input type="checkbox"/> Council rates                            | <input type="checkbox"/> Licenses                              | <input type="checkbox"/> Uniforms                             |
| <input type="checkbox"/> Cleaning                                 | <input type="checkbox"/> Lighting                              | <input type="checkbox"/> Union fees                           |
| <input type="checkbox"/> Clothing (protective)                    | <input type="checkbox"/> Motor Vehicle (registration, parking) |   |
| <input type="checkbox"/> Computers and software                   | <input type="checkbox"/> Pest control                          |   |
| <input type="checkbox"/> Conferences / seminars                   | <input type="checkbox"/> Phone call / installations            |   |
| <input type="checkbox"/> Delivery expenses                        | <input type="checkbox"/> Postage                               |   |
| <input type="checkbox"/> Depreciation                             | <input type="checkbox"/> Power and connection                  |   |
| <input type="checkbox"/> Discharge of mortgage expenses           | <input type="checkbox"/> Printing                              |   |
| <input type="checkbox"/> Donations / gifts – prescribed charities | <input type="checkbox"/> Professional association fees         |   |
| <input type="checkbox"/> Dry cleaning expenses                    | <input type="checkbox"/> Protective equipment                  |   |
| <input type="checkbox"/> Education expenses                       | <input type="checkbox"/> Rates – Council                       |   |
| <input type="checkbox"/> Electricity and connection               | <input type="checkbox"/> Rates – water                         |   |
| <input type="checkbox"/> Entertainment (limited)                  | <input type="checkbox"/> Rent                                  |   |
| <input type="checkbox"/> Financial charges                        | <input type="checkbox"/> Repairs                               |   |
| <input type="checkbox"/> First aid courses                        | <input type="checkbox"/> Self education                        |   |
| <input type="checkbox"/> Fuel and oil                             | <input type="checkbox"/> Stamp duty                            |   |

## Tips to organise your records

Try the following to help organise your records:

- ☐ Mark work expenses with a text highlighter
- ☐ Sort records into the five categories listed below
- ☐ Store records in order with the most recent on top.  
Be sure to include:
  1. Vehicle travel
  2. Home office
  3. Telephone
  4. Other expenses
  5. Income / salary

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Date: July 2018