

# Tax Return Checklist

END OF FINANCIAL YEAR 21/22



**STS**  
ACCOUNTING  
GROUP

In order for our accountants to prepare your Tax Return efficiently, please complete these questions to the best of your ability.

If you would prefer not to include some responses, please leave those fields blank and we can discuss these on the phone with you, once your form has been submitted.

## YOUR DETAILS

**Full Name (Tax Payer 1)**

Mobile Number

Date of Birth

Street address

Suburb

Post Code

State

Occupation

E-mail Address

Are you an Australian Resident

Do you have a current Will?

Do you have Personal  
Income Insurance?

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**Partner Name (Tax Payer 2)**

Mobile Number

Date of Birth

E-mail Address

Partner Occupation

Separate Net Income

Is your partner an Australian  
Resident

Does your partner  
have a current Will?

Does your partner have  
Personal Income Insurance?

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## 2021/22 INCOME

Were YOU employed & paid wages?

Yes

No

Was your PARTNER employed & paid wages?

Yes

No

Did YOU receive Centrelink payments?

Yes

No

Did your PARTNER receive Centrelink Payments

Yes

No

Did YOU receive a superannuation payout?

Yes

No

Did your PARTNER receive a superannuation payout?

Yes

No

Was YOUR super payout due to COVID19?

Yes

No

Was your PARTNER'S payout due to COVID19?

Yes

No

**Interest Received**

#1 Interest paid to:	Bank	Account Number	Amount	TFN WH
#2 Interest paid to:	Bank	Account Number	Amount	TFN WH
#3 Interest paid to:	Bank	Account Number	Amount	TFN WH

**Dividends Received**

**Dividends Received #1**

Company Name	Amount Unfranked	Amount Fully Franked
Dividends paid to:	Date Paid	IMP Credit
	<input type="text"/>	

**Dividends Received #2**

Company Name	Amount Unfranked	Amount Fully Franked
Dividends paid to:	Date Paid	IMP Credit
	<input type="text"/>	

**Please note:** If you have additional income from dividends, interest or earnings beyond what is listed here; have income from cryptocurrencies; and/or your interest/dividends are shared with your partner or other, please complete the additional Interest & Dividends spreadsheet available on our website and submit in conjunction with this form.

**Partnership / Trust Income**

Did YOU receive a Partnership / Trust Distribution?

Yes

No

Did your PARTNER receive a Partnership / Trust Distribution?

Yes

No

## Capital Gains

Did you or your partner sell shares/property or any other assets during the 21/22 year?

Yes, I did

Yes, my partner did

Yes, we sold joint assets

No

If yes, please give details:

## Business Schedule

Did you or your partner receive a business income during the 21/22 year?

Yes, I did

Yes, my partner did

Yes, we both did

No

If yes, please attached the business schedule or include details below.

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## 2021/22 DEDUCTIONS

### Car Deductions

Did you use your car for work related travel? If yes, complete details relating to your vehicle.

Yes

No

Motor Vehicle Registration Number	Make / Model	Log Book % Work Related	Total Number of KMS
Registration Costs \$	Fuel Expenses \$	Insurance Paid \$	
Interest paid on loan \$	Repairs & Maintenance Expenses \$		

### Work Related Travel

<b>Trip #1 Expenses</b>	Travelling with:	Were travel records maintained?	Reason for travel
		Yes	
Airfare Costs	Accommodation Costs	Parking Costs	Food and Beverage Costs

<b>Trip #2 Expenses</b>	Travelling with:	Were travel records maintained?	Reason for travel
		Yes	
Airfare Costs	Accommodation Costs	Parking Costs	Food and Beverage Costs

If you have additional work related travel expenses please attached a separate spreadsheet with further details.

### Uniform/Protective Clothing Expenses

**You:**

Uniform Costs \$	Protective Clothing Costs \$	Sunscreen/hats etc Costs \$
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**Your Partner:**

Uniform Costs \$	Protective Clothing Costs \$	Sunscreen/hats etc Costs \$
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### Self Education Expenses - Apprentices & Students

**You:**

Course fees \$	Travel to study \$	Monthly Internet \$	Monthly % internet use
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Light & Power - estimate <b>hours</b> per month spent studying	Stationary, software & computer \$
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**Your Partner:**

Course fees \$	Travel to study \$	Monthly Internet \$	Monthly % internet use
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Light & Power - estimate <b>hours</b> per month spent studying	Stationary, software & computer \$
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### Other Deductions: anything else you have bought/used for work

**Home Office - You:**

Mobile Monthly \$	Mobile Work Use Monthly %	Internet Monthly \$	Internet Work Use Monthly %	Light & Power - est hours per week
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**Home Office - Your Partner:**

Mobile Monthly \$	Mobile Work Use Monthly %	Internet Monthly \$	Internet Work Use Monthly %	Light & Power - est hours per week
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Additional deductions:

Please give details:

- Short courses / seminars
- Tools
- Union Fees
- Professional Subscriptions
- Other
- Claims <\$200<\$10 each?

**Gifts or donations**

#1 Donation / Gift Details	Amount	Donated by:
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#2 Donation / Gift Details	Amount	Donated by:
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#3 Donation / Gift Details	Amount	Donated by:
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**Cost of Managing Tax Affairs**

Tax Agent Fee \$	Distance to Travel to Tax Agent (kms)
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**Personal Super Contributions**

These are payments paid by you or your spouse. They are not paid by your employer or salary sacrificed. A Super Fund acknowledgement letter is required, dated before 30 June 2021.

You \$	Your Partner \$
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**Insurances**

Do you have Private Health cover? Name of Fund:	Type of Cover:	# of dependent children
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Thank you for completing the STS Accounting Group Client Tax Return Checklist 2021/22.  
We look forward to discussing your return with you shortly.

**If you have any questions regarding this form  
please call one of our expert accountants at  
Torquay: (03) 5261 2262  
Winchelsea (03) 5267 2673**

Please e-mail your completed form to [admin@surftax.com.au](mailto:admin@surftax.com.au) and one of our expert accountants will be in touch with you shortly to finalise your Tax Return.

**[surftax.com.au](http://surftax.com.au)**