

### YEAR END

#### PERSONAL DETAILS

NAME TFN

HOME ADDRESS

EMAIL

MOBILE DATE OF BIRTH

#### BANKING DETAILS

ACCOUNT NAME BANK NAME

BSB ACCOUNT NUMBER

#### INCOME DETAILS

*PLEASE NOTE: YOUR INCOME SUMMARIES FROM EMPLOYERS WILL BE AVAILABLE FROM MYGOV* CURRENT OCCUPATION

#### OTHER INCOME

DID YOU HAVE ANY OTHER INCOME DURING THIS PERIOD? *IF YES, PLEASE PROVIDE A DESCRIPTION AND PROVIDE DETAILS REGARDING THE OTHER INCOME*

INCOME OTHER INCOME DEDUCTIONS

RENTAL INCOME LIST OF RENTAL PROPERTIES

#### TRAVEL & HOME OFFICE

NUMBER OF WORK KM'S TRAVELLED *IF YES, PLEASE PROVIDE A DESCRIPTION AND PROVIDE DETAILS*

TAXI/UBER FARES

NUMBER OF HOURS WORKED FROM HOME

CLAIMING WORK-FROM-HOME AND HOME OFFICE EXPENSES HAVE CHANGED SIGNIFICANTLY IN THE 2023 FINANCIAL YEAR. PLEASE ENSURE THAT YOU HOLD THE APPROPRIATE RECORDS (TIME LOGS AND RECEIPTS) FOR TAX PURPOSES AS ATO AUDIT RISK HAS INCREASED.

FROM **1 MARCH 2023** ONWARDS, YOU MUST LOG ALL HOURS WORKED FROM HOME AND BE ABLE TO PROVIDE SUBSTANTIATION.

OTHER WORK-RELATED DEDUCTIONS

PLEASE ENSURE YOU CAN SUBSTANTIATE ALL CLAIMS COST DESCRIPTION RECEIPT ATTACHED

- INTERNET
TELEPHONE/MOBILE PHONE
COMPULSORY UNIFORM
WORK-RELATED CLOTHING
PROTECTIVE CLOTHING
OCCUPATION SPECIFIC CLOTHING
DRY CLEANING EXPENSES
CONFERENCE/SEMINARS
COMPUTERS & SOFTWARE
TOOLS & EQUIPMENT
UNION FEES
INCOME PROTECTION
SUBSCRIPTIONS
DONATIONS

PLEASE ATTACH AN EXAMPLE FOR THE THREE REQUESTED RECEIPTS

DEPRECIABLE ITEMS

PLEASE LIST ANY ITEMS OVER \$300 PURCHASED DURING THE YEAR JULY 2022 – JUNE 2023 AND/OR SUPPLY RECEIPTS:

DESCRIPTION COST WORK-RELATED %

PLEASE ENSURE YOU CAN SUBSTANTIATE ALL CLAIMS

### OTHER INFORMATION

PLEASE LIST ANY OTHER INFORMATION WHICH YOU ARE UNSURE OF, OR WHICH YOU WOULD LIKE US TO BE AWARE OF:

I further confirm that:

- I. I am aware of the procedures to follow if a document is lost or destroyed.
- II. I may be required to verify any income or expense item noted in my return in the event of an ATO audit.
- III. I understand the Substantiation schedules I completed for all work, car and travel expense claims under self-assessment.
- IV. I understand that, for the purposes of obtaining “safe harbour” protection, it remains my responsibility to properly record matters relating to my tax affairs and to bring all of the relevant facts to your attention in order to show reasonable care; and
- V. I declare that:
  - a. I have disclosed, and you have returned, all of the income including net capital gains which I have earned/received, for the 2021 income year.
  - b. 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.
  - c. I have all receipts or documentation necessary to substantiate the above claims and I will make them available if required by the Tax Office; and
  - d. You have clarified what written evidence (including car/travel records) will be required during an audit and penalties, (including prosecution) that may be applied if incorrect claims are identified in an audit situation.
  - e. I am aware of my land tax responsibilities and will be held accountable for all necessary registration and lodgement requirements.