

# Individuals Tax Interview Checklist



## 2018 Income Tax Return

The 2018 Financial year relates to the period from 1 July 2017 to 30 June 2018

Current email address: \_\_\_\_\_

(if you have already provided your email address on a previous form with us today, you can ignore this question)

### Visa Status (foreign residents only)

417

462

Other

### Income:

- Salary & wages Yes  No
- Occupation \_\_\_\_\_
- Newstart, sickness, pensions or other Govt. payments Yes  No
- Bank interest Yes  No
- Dividends Yes  No
- Rental income Yes  No
- Foreign income (including foreign pensions, assets, and property) Yes  No
- Other income (eg. Managed Funds) Yes  No
- If yes, please specify \_\_\_\_\_

### Deductions:

- Work related car expenses (*excludes from home to work*) Yes  No
- Work related travel expenses Yes  No
- Work related uniform and other clothing expenses:
  - Are you required to wear a uniform with a registered logo? Yes  No
  - Are you required to wear protective clothing? Yes  No
- Self-education expenses (work related):
  - Course fees (*not including HECS/HELP payments*) Yes  No
  - Travel (*to courses or from work to place of study*) Yes  No
  - Text books Yes  No
- Other work related expenses:
  - Home office expenses Yes  No
  - Computer & software Yes  No
  - Phone & internet Yes  No
  - Tools & equipment Yes  No
  - Subscriptions, union fees, etc Yes  No

Please turn over...

- Gifts or donations Yes  No
- Any other work deductions Yes  No 
  - If yes, please specify \_\_\_\_\_

**Other tax related questions:**

- Number of dependent children at 30 June 2018 \_\_\_\_\_ N/A
- Did you receive family payments from the Family Assistance Office? Yes  No
- Have you sold any assets (*including Main Residence*)? Yes  No
- Do you (and your dependents) have private health insurance? Yes  No
- Do you have Income Protection **outside of your super fund**? Yes  No
- Do you have Life/Trauma Insurance? Yes  No
- Have you put voluntary contributions into superannuation? Yes  No
- Do you own more than 5 acres of land? Yes  No
- Do you have a legal will? Yes  No
- Have you changed address in the last financial year? Yes  No

- If yes, provide your new address: \_\_\_\_\_  
 \_\_\_\_\_ Suburb: \_\_\_\_\_ P/Code: \_\_\_\_\_

- Bank Details (*for your refund to be deposited into directly from the ATO*) – **this question is compulsory if details have changed since you last filled out this form or if you are a new client with Smartax.**

BSB: \_\_\_\_\_ Account No.: \_\_\_\_\_

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

**Do you require any other advice?** (Please circle)

Retirement // Investment // Insurance // Finance/Lending // Tax or Business Planning

**Taxpayers Declaration:**

I, \_\_\_\_\_ declare that all the information I have given is true and correct. I acknowledge that I have engaged Smartax to handle my tax affairs based on the information I have supplied them. I understand that it is my responsibility to maintain receipts and other documentary evidence for at least 2 years for Work Related Expenses, and 5 years for business, investments, capital gains or losses and any other matters.

Taxpayer's signature: \_\_\_\_\_ Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_\_

Once completed, please hand your form in to reception