



TAX RETURN CHECKLIST P.2

-INDIVIDUAL

EXPENSES		Applicable YES/NO	Amount
Vehicle - Did you use your car for work? ▶ Aside from driving to and from work how many kilometres did you travel?			
Did you have to travel for work? ▶ E.g. overnight stays at conferences, visiting clients, etc.			
Do you wear a uniform or protective clothing for work? ▶ How much did you spend on purchasing uniform/protective clothing?			
Did you do any work related study?			
Do you do any work from home?	Do you have a logbook showing total hours worked from home for this year?		
	How much is your electricity & gas bills?		
Other expenses	Do you use your home internet for work?		
	Do you purchase any tools of trade?		
	Are you a member of any associations or unions?		
	Did you purchase any tools of trade?		
	Did you purchase any office equipment?		
	Was there anything else work related you were out of pocket for?		
Did you make any donations?			
Did you pay for an accountant to prepare your return?			
Were you out of pocket for expenses relating to your investment income (e.g. margin loans, etc.)			
Did you pay for your income protection insurance personally? ▶ Please provide a policy statement for the financial year			

OTHER		Applicable YES/NO	Amount
Do you have a HECS (HELP Debt)?			
Did you have private Health Insurance? ▶ Please provide Annual Statement			
Number of dependent children (under 21 years old of 21-24 years old and full-time student)			
Spouse details (if spouse is not a client of AJS Accounting)	Name:		
	Date of Birth:		
	Taxable Income:		
	Was this your spouse for the full year?		