

CERTIFIED PRACTISING ACCOUNTANTS
TAX AGENTS

POSTAL ADDRESS:
P.O. Box 465,
Mt. Ommaney. Q. 4074

2024 Electronic Lodgement Checklist

Please ensure you complete ALL questions and provide additional information as necessary on separate sheets and securely attach all documentation to this form. New Clients, please bring Photo ID to your appointment or attach a copy to this checklist.

Full Name	
Tax File Number	
Date of birth	
ABN (if applicable)	
Occupation	
Address	
Address (postal) <i>(Put 'as above' if the same)</i>	
Telephone contacts <i>*please indicate preferred contact</i>	Mobile:
	Business Hours (work) :
	After Hours (home):
Email	
Bank account details	Name of account:
	BSB:
	Account number:

Please circle **YES** or **NO** for each of the items listed below and provide relevant details (if known).

Spouse details – married or *de facto* (including same sex)

Did you have a spouse for the full year from 1 July 2023 to 30 June 2024?YES/NO

If you had a spouse for only part of the income year, please specify the dates between 1 July 2023 to 30 June 2024 when you had a spouse:

From ____ / ____ / _____ to ____ / ____ / _____

What is your spouse's name and date of birth? (If you had more than one spouse during 2023, provide the name of your spouse on 30 June 2024 or your last spouse)

Name:

DOB:

IF WE DO NOT PREPARE YOUR SPOUSE'S TAX RETURN, PLEASE ANSWER THE FOLLOWING.

What was your spouse's taxable income for the 2024 income year?..... \$ _____

Does your spouse have a share of trust income YES/NO \$ _____

Did a trust or company distribute income to your spouse? YES/NO \$ _____

Did your spouse have any reportable fringe benefits amounts for the 2024 income year? - Employer Exempt from FBT YES/NO \$ _____

Did your spouse receive any Australian Government pensions or allowances (not including exempt pension income) in the 2024 income year? YES/NO \$ _____

Did your spouse receive any exempt pension income in the 2024 income year? ... YES/NO \$ _____

Does your spouse have any reportable super contributions for the 2024 income year?.....
..... YES/NO \$ _____

Did your spouse receive any tax-free government pensions paid under the *Military Rehabilitation and Compensation Act 2004*? YES/NO \$ _____

Did your spouse receive any foreign income in the 2024 income year?..... YES/NO \$ _____

Did your spouse have a total net investment loss (i.e., the total of any financial investment loss and a rental property loss) for the 2024 income year?..... YES/NO \$ _____

DEPENDANT CHILDREN

Do you have any Dependant Children YES / NO How many? _____

Did your family receive Family Tax Benefit YES/NO

INCOME

Payment Summaries and Termination payments (please attach if available) YES/NO

Reportable Fringe Benefits (FBT) YES/NO

Reportable Employer Superannuation Contribution (RESC) YES/NO

Unemployment / Sickness Benefits / Austudy etc - (please attach if available) YES/NO

Centrelink Pensions - (please attach if available) YES/NO

Cryptocurrency-Have you bought/sold or exchanged (please attached taxation statement or workings) YES/NO

Crypto Rewards- Have you received bonus coins/airdrops or rewards (please attach) YES/NO

Interest Received on Bank Accounts (please attached details)..... \$ _____

Distributions from Trusts & Managed Investments (please attach yearly taxation statement) YES/NO

Dividends - (attach payment slips for tax credits) YES/NO

Were the shares held for more than 45 days YES/NO

Rental Properties (refer to our website for additional schedule)..... YES/NO

Business Income (please attach) YES/NO

Do you earn income from any ride sharing apps e.g. Uber/Didi/Ola YES/NO

Are you registered for GST YES/NO

If no, when did you start driving / /

Have you prepared and lodged your BAS (please attach)..... YES/NO

Proceeds from cashed in / matured Life Policies,

Insurance or Friendly Society Bonds (attach details) YES/NO

Employee Share Schemes..... YES/NO

Details of sale of assets including main residence, rental property or shares etc YES/NO

If you are under 65, did you withdraw any funds from your superannuation for any reason YES/NO

Any other income YES/NO

DEDUCTIONS AND REBATES

The following deductions and tax offsets ('rebates') are available to obtain the maximum refund for you. As these can be complex, we may need to discuss them with you by telephone before completing your return, if you are mailing this to us.

DEDUCTIONS

1. Work related car expenses – we recommend you obtain advice from your Accountant in relation to this.

– Cents per kilometre method (up to a maximum of 5,000 kms @ 85c/km YES/NO

How many kilometre's _____ Vehicle Make & Model _____

– Log book method YES/NO

If yes, please provide detailed break up amount to be claimed

– Any other details-Purchased or sold date, energy saving vehicle (electric), or other special details that may be relevant

2. Work related uniform and other clothing expenses

Uniform (with logo),protective or “occupation specific” clothing \$ _____

Laundry expenses (up to \$150 without receipts) \$ _____

Dry cleaning expenses (must have receipts)..... \$ _____

Sun protection products (i.e., sunscreen and sunglasses) \$ _____

Other claims such as mending/repairs, etc (please specify) \$ _____

3. Work related self-education expensesSelf Education Code *(please circle the code applicable to your situation)*

K Study required for current work I study for increased income from current work O Other direct connection to current work

Course taken at educational institution:

- Course fees *(inc VET/HELP Fees)* \$ _____
- Books, stationery \$ _____
- Hardware *(computers, tablets, iPad etc)* \$ _____
- Travel to/ from educational place \$ _____
- Other *(please specify)* YES/NO

4. Other work related expenses *(please provide full details)*Home office expenses *(refer to our website for additional schedule)*..... YES/NO

Were you required to work from home ? YES/NO

(between 1 July 2023 and 30 June 2024) number of hours worked from home

Books and Reference materials \$ _____

Union Fees \$ _____

Telephone/mobile phone \$ _____

Tools of Trade \$ _____

Professional Memberships \$ _____

Any other work related deductions i.e purchase of new computer *(please specify)* \$ _____**5. Other Deductions**

Income Protection Insurance \$ _____

School Building Fund \$ _____

Donations to Charity (Not Art Union) *(please specify)* \$ _____

Tax Agent's Fee \$ _____

Personal contributions to your super fund *(please attached confirmation letter from super fund)*..... \$ _____**Tax offsets/rebates – Please provide evidence**

Are you a senior Australian or pensioner?..... YES/NO

Did you receive an Australian superannuation income stream? YES/NO

Did you make superannuation contributions on behalf of your spouse? YES/NO

Did you live in a remote area of Australia or serve overseas with the Australian

Defence force or the UN armed forces in 2024? YES/NO

Place/Town Number of days Resident

Did you maintain an invalid or carer dependant including your spouse, parent,
Parent-in-law, your or your spouse's child, brother or sister aged over 16 years old? YES/NO

Private health insurance policy details

Do you have private health insurance YES/NO

If YES – please attached statement as provide by your private health insurer if available

If during the year you married/ separated / divorced. Please ensure that you specify the date on page 2.

Child Support

Did you or your spouse pay child support during the 2024 income year? YES/NO

You \$ _____ Your Spouse \$ _____

DECLARATION:

I certify that the above details are true and correct, and disclose a full and complete statement of income and deductions for the year ended 30 June 2024.

I hereby authorise Peter I Price & Associates to prepare and lodge my Income Tax Return by electronic means.

Taxpayer's Signature _____ Date _____