

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

Provided	INCOME
<input type="checkbox"/>	<b>Payment summaries:</b> <ul style="list-style-type: none"> <li>Employers now report wages directly to the ATO via STP and do not issue PAYG statements</li> <li>Employer lump sum payments, Employment termination payments</li> <li>Government pensions &amp; allowances</li> </ul>
<input type="checkbox"/>	<b>Interest Income</b> – from savings accounts, term deposits - interest is now reported to the ATO by banks
<input type="checkbox"/>	<b>Australian annuities and superannuation income streams</b> – provide payment summaries from fund
<input type="checkbox"/>	<b>Dividends</b> – from listed shares or privately held companies - ASX dividends will be reported to the ATO
<input type="checkbox"/>	<b>Annual Taxation Statements from managed funds</b>
<input type="checkbox"/>	<b>Employee share scheme (ESS) income</b> – ESS statement provided by your employer
<input type="checkbox"/>	<b>Rental property income and expenses, including:</b> <ul style="list-style-type: none"> <li>Agents annual summary of income and expenses (if applicable)</li> <li>Confirmation of interest paid on loans</li> <li>Quantity Surveyors report summarising depreciation deductions</li> <li>If self-managed, rental income details, rates and land tax notices, insurance, body corporate, water &amp; sewage, repairs and maintenance invoices</li> </ul>
<input type="checkbox"/>	Details of any <b>foreign income</b> , including employment, interest and investment income
<input type="checkbox"/>	<b>Capital gains</b> – on the sale of property, shares or investments Provide copies of purchase documents and sale documents and associated costs such as legal fees, brokerage, agents commission
<input type="checkbox"/>	<b>Business Income</b> - Income from work undertaken as a sole trader, including a summary of related expenses, equipment purchases and loan repayments.
Provided	DEDUCTIONS
<input type="checkbox"/>	<b>Work-related car expenses</b> <ul style="list-style-type: none"> <li>Business kilometres travelled (up to 5,000kms) or</li> <li>provide a copy of your log book with details of running expenses – petrol, insurance, registration &amp; servicing costs</li> </ul>
<input type="checkbox"/>	<b>Work-related travel expenses</b> (transport, accommodation) – provide details of expenditure
<input type="checkbox"/>	<b>Work-related uniform, occupation specific or protective clothing, laundry and dry-cleaning expenses</b> – provide details of expenses incurred
<input type="checkbox"/>	<b>Work-related self-education expenses</b> - such as course fees, text books
<input type="checkbox"/>	<b>Other work-related expenses</b> - such as professional memberships, home office (please provide number of days worked from home. Evidence is required such as timesheet/diary), phone, union fees, tools
<input type="checkbox"/>	<b>Personal Superannuation Contributions</b> – provide contribution details with notices from fund
<input type="checkbox"/>	<b>Dividend deductions</b> – if you have borrowed to buy shares, provide details of interest paid
<input type="checkbox"/>	<b>Gifts or donations to charities</b> – provide a summary of donations or receipts
<input type="checkbox"/>	<b>Tax Agent Fees</b> – invoice of fees paid in the 2022/23 year to prepare your 2022 tax return
<input type="checkbox"/>	<b>Income Protection Premiums</b> – annual statement from your insurer

Provided	OTHER							
<input type="checkbox"/>	<b>Private Health Insurance</b> – Health Fund's report this information directly to the ATO							
<input type="checkbox"/>	<b>Medicare levy reduction or exemption</b> – provide confirmation from Medicare if applicable							
<b>If your spouse's return is prepared elsewhere, please provide the following information:</b>								
<input type="checkbox"/>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">Spouse Name:</td></tr> <tr><td style="text-align: center;">DOB:</td></tr> <tr><td style="text-align: center;">2023 Taxable Income:</td></tr> <tr><td style="text-align: center;">2023 RESC:</td></tr> <tr><td style="text-align: center;">2023 RFB:</td></tr> <tr><td style="text-align: center;">Net investment loss:</td></tr> <tr><td style="text-align: center;">No. of dependent children:</td></tr> </table>	Spouse Name:	DOB:	2023 Taxable Income:	2023 RESC:	2023 RFB:	Net investment loss:	No. of dependent children:
Spouse Name:								
DOB:								
2023 Taxable Income:								
2023 RESC:								
2023 RFB:								
Net investment loss:								
No. of dependent children:								
<b>Please provide bank account details for any tax refund to be paid into:</b>								
<input type="checkbox"/>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">Account Name:</td></tr> <tr><td style="text-align: center;">Account Number:</td></tr> <tr><td style="text-align: center;">BSB:</td></tr> </table>	Account Name:	Account Number:	BSB:				
Account Name:								
Account Number:								
BSB:								
<input type="checkbox"/>	A copy of your 2022 income tax return and ATO notice of assessment							
<input type="checkbox"/>	Any other information that you think may be relevant for the preparation of your income tax return would like to be reviewed							

Once you have completed the individual checklist please bring the checklist together with the compiled information with you to your appointment or if providing electronically, forward to [marko@momentumca.com.au](mailto:marko@momentumca.com.au)

*If you have any questions please do not hesitate to contact us*