



## 2020 Individual Tax Checklist

**\*\*Did you trade as a sole trader between 1 July 2019 to 30 June 2020?\***

- NO. Please continue completing this checklist
- YES. If Yes, please **DO NOT** complete this checklist. Please either contact Baggetta & Co immediately to email you the 2020 Sole Trader Checklist or download it directly from our website ([www.baggetta.com.au](http://www.baggetta.com.au))

To assist us in preparing your income tax return in accordance with Australian Taxation Office requirements, please provide supporting documentation to substantiate all your claims including copies of receipts, tax invoices, bank statements, payment summaries, contracts, agreements and other relevant correspondence.

With respect to your income, please keep in mind that the Australian Taxation Office has the ability to check your return income against independent sources. In particular, this applies to PAYG Payment Summary income, interest received, dividends, shares sold etc.

For deductions, keep in mind that self-assessment applies. In the event of a Tax Office audit you will need to be able to substantiate the deductions claimed.

### **\*\*DELIVERY UPON COMPLETION\*\***

(Please tick preferred delivery method upon completion of your income tax return)

- Email to me (only applicable to clients who email or use dropbox to send their tax information in to us)  
(Email or dropbox to [advice@baggetta.com.au](mailto:advice@baggetta.com.au). Please use dropbox if your email and attachments are 10MB or more)
- I will collect it from your office upon notification from you
- Post to me (I understand postage fees may apply)

### **PERSONAL DETAILS**

MR/MRS/MS/MISS (please indicate)

First Name/s: \_\_\_\_\_ Surname: \_\_\_\_\_

Residential Address: \_\_\_\_\_

Postal Address (if different to above): \_\_\_\_\_

Email Address: \_\_\_\_\_

Telephone

Mobile: \_\_\_\_\_ Work: \_\_\_\_\_ Home: \_\_\_\_\_

Your Current Occupation: \_\_\_\_\_

**1. DO YOU HAVE A SPOUSE (MARRIED OR DE FACTO)?**

- NO. Go to question 2
- YES. If Yes, are we preparing their tax return
  - NO. Please complete SPOUSE DETAILS below
  - YES. Go to question 2

**SPOUSE DETAILS**

MR/MRS/MS/MISS (please indicate)

First Name/s: \_\_\_\_\_ Surname: \_\_\_\_\_

Spouse's Date of Birth: \_\_\_\_\_

Spouse's Taxable Income: \_\_\_\_\_

Spouse's Reportable Fringe Benefits Amount (if any): \_\_\_\_\_

Spouse's Reportable Superannuation Contributions (if any): \_\_\_\_\_

Spouse's Share of Net Investment Loss including Rental Loss (if any): \_\_\_\_\_

**2. DO YOU HAVE DEPENDENT CHILDREN?**

- NO. Go to INCOME
- YES. If Yes, please complete CHILD DEPENDENT DETAILS below

**CHILD DEPENDENT DETAILS**

Name of child dependent: \_\_\_\_\_ Date of Birth: \_\_\_/\_\_\_/\_\_\_

Name of child dependent: \_\_\_\_\_ Date of Birth: \_\_\_/\_\_\_/\_\_\_

Name of child dependent: \_\_\_\_\_ Date of Birth: \_\_\_/\_\_\_/\_\_\_

Name of child dependent: \_\_\_\_\_ Date of Birth: \_\_\_/\_\_\_/\_\_\_

**INCOME**

- 1. Did you receive salary or wages?
  - NO. Go to question 2
  - YES. If Yes, please provide
    - PAYG Payment Summary/Summaries
  
- 2. Were you part of an employee share scheme?
  - NO. Go to question 3
  - YES. If Yes, please provide
    - Employee share scheme statement

3. Did you receive any payments from Centrelink?  NO. Go to question 4  
 YES. If Yes, please provide  
 PAYG Payment Summary
4. Did you receive any pension payments from a Super Fund including a Self Managed Super Fund?  NO. Go to question 5  
 YES. If Yes, please provide  
 PAYG Payment Summary
5. Did you receive any lump sum or termination payments?  NO. Go to question 6  
 YES. If Yes, please provide  
 ETP PAYG Summary
6. Did you receive any bank interest?  NO. Go to question 7  
 YES. If Yes, please provide  
 Annual bank summary statement
7. Did you receive any dividends from shares you owned?  NO. Go to question 8  
 YES. If Yes, please provide  
 Dividend statements including dividends reinvestments
8. Did you receive any partnership or trust distributions?  NO. Go to question 9  
 YES. If Yes, please provide  
 Annual tax summary statement (if applicable)  
 Annual distribution statement (if applicable)
9. Did you sell any shares?  NO. Go to question 10  
 YES. If Yes, please complete form below  
 Capital gains tax checklist  
(if you do not have one, please call baggetta & co)
10. Did you receive rental income?  NO. Go to question 11  
 YES. If Yes, please complete form below  
 Rental checklist  
(if you do not have one, please call baggetta & co)

11. Did you sell your rental property?  NO. Go to question 12  
 YES. If Yes, please provide  
 FINAL settlement statement of sale
12. Did you receive any foreign income?  NO. Go to question 13  
 YES. If Yes, please provide  
 PAYG Payment Summary, and/or  
 Any other supporting documentation
13. Did you receive any other income not mentioned above?  NO. Go to DEDUCTIONS  
 YES. If Yes, please provide  
 Supporting documentation

## DEDUCTIONS

1. Did you use your car for work related purposes?  
*(Note: EXCLUDE Home to Work travel)*  NO. Go to question 2  
 YES. If Yes, please select method of claim  
 Work kms travelled: \_\_\_\_\_ km,  
  - Make & Model of Motor Vehicle: \_\_\_\_\_
OR  
 Logbook method. Please complete form below  
 MV logbook form  
*(if you do not have one, please call baggetta & co)*
2. Did you have to travel overseas or interstate for work?  NO. Go to question 3  
 YES. If Yes, please complete form below  
 Work related travel form  
*(if you do not have one, please call baggetta & co)*
3. Did you have to wear a uniform with your company logo/name and/or protective clothing?  NO. Go to question 4  
 YES. If Yes, please complete ONE of the following:  
 Where ONLY the work clothes is washed each time  
*(ATO allows \$1 per load):*  
\_\_\_\_\_ loads/wk x \_\_\_\_\_ weeks  
 Where both private clothes and work clothes are washed together *(ATO allows \$0.50 per load):*  
\_\_\_\_\_ loads/wk x \_\_\_\_\_ weeks

4. Did you purchase any protective clothing and/or footwear?

NO. Go to question 5

YES. If Yes, please provide

Receipts for items purchased (eg. Steel capped boots, gloves etc.)

5. Did you undertake any study that would maintain or improve a skill required for your current work?

NO. Go to question 6

YES. If Yes, please provide

Receipts for items purchased (eg. Textbooks, stationery, course fees etc.)

6. Did you have any other work related expenses?

NO. Go to question 7

YES. If Yes, please indicate below and provide supporting documentation

*\*\*Please ensure you have a diary that can substantiate your work use over a 4-week representative period (this needs to be maintained EACH year a claim is made)*

Union fees

Trade/professional subscriptions

Seminars, courses, conferences, workshops

Books, technical journals

Tools and equipment

Mobile phone use\*\* Please complete form below

Home internet use\*\* Please complete form below

Home telephone use\*\* Please complete form below

Home office claim (non COVID-19 related)

\*\* Please complete form below

Home office, mobile phone, internet and home phone expenses claim form  
(if you do not have one, please call baggetta & co)

Home office claim (COVID-19 related between 1 March 2020 to 30 June 2020)

\*\* Please complete form below

COVID-19 Working from home claim form  
(if you do not have one, please call baggetta & co)

7. Did you make a donation of \$2 or more to an approved charity?  NO. Go to question 8  
 YES. Please provide  
 Receipts
8. Did you pay someone other than baggetta & co to prepare your tax return last year?  NO. Go to question 9  
 YES. If Yes, please provide  
 Invoice from other tax agent/accountant
9. Did you have a loan for your investments?  NO. Go to question 10  
 YES. If Yes, please provide  
 Loan statements
10. Did you make any personal superannuation contributions?  
*(Note: Superannuation that has been salary packaged/sacrificed through an employer DOES NOT qualify for this deduction)*  NO. Go to question 11  
 YES. If Yes, did you provide your superfund with a notice of intent to claim the deduction?  
 NO. Go to question 11  
 YES. Please provide the written acknowledgement statement from your fund
11. Did you have income protection insurance?  NO. Go to TAX OFFSETS  
 YES. If Yes, was it paid out of your superfund?  
 NO. Please provide the Annual statement of claim from your insurance provider  
 YES. Go to TAX OFFSETS

## TAX OFFSETS

1. Is your **usual place of residence** (i.e. do you LIVE) in a prescribed REMOTE area of Australia?  
 NO. Go to MEDICARE LEVY SURCHARGE  
 YES. If Yes, please complete below  
  - Location: \_\_\_\_\_

## MEDICARE LEVY SURCHARGE

1. Did you and your dependants\* have private hospital cover?  NO. Go to OTHER INFORMATION  
 YES.

\*For Medicare levy purposes, a dependant is:

- a resident spouse even if they worked and had their own income (including de-facto and same sex couples)
- a resident child under 21 years old
- a resident child, aged 21 to 24 years old, FULL TIME student at school, college or university

**OTHER INFORMATION**

1. Did you pay child support during the period 1 July 2019 to 30 June 2020?  NO. Go to question 2  YES. If Yes, please provide  Amount of child support paid \$\_\_\_\_\_

2. Did you receive the NRAS\* Tax Offset?  NO. Go to question 3  YES. If Yes, please provide  Statement showing the NRAS tax offset amount

\*National Rental Affordability Scheme

3. Do you have a current HECS/HELP or SSFS Debt?  NO. Please sign declaration below  YES. If Yes, please provide  HECS/HELP/SSFS Statement/s from the ATO

**NEW CLIENTS ONLY**

Please provide the following information:

- Date of Birth: \_\_\_\_\_
- Tax File Number: \_\_\_\_\_
- Photo Identification:  Provided

Please also provide a copy of the following:

- 1. 2019 Individual Tax Return  Provided  If not provided, why not? \_\_\_\_\_

**I confirm that I have reviewed the above checklist and have supplied all the relevant information to prepare my 2020 income tax return.**

**I also confirm that the above information is correct to the best of my knowledge and that where necessary I hold documentary evidence in support of my claims.**

Dated the ..... day of ..... 20.....

.....  
Signature of Taxpayer

.....  
Name (print)