



AlexanderSpencer

p: 03 8199 3000
e: info@alexanderspencer.com.au
w: www.alexanderspencer.com.au

PO Box 95, Burwood VIC 3125
Unit 6, 1414 Toorak Road,
Camberwell VIC 3124

Your 2023 Individual Tax Checklist

If Alexander Spencer have not prepared your return previously, please attach a full copy of your previous year's tax return and any other relevant information from previous years.

- If you own a rental property, please refer to our Rental Property Schedule.

Personal Details

Title: Mr Mrs Miss Ms Other:

Full Name:

Occupation:

Phone No:

Mobile:

Tax File Number:

Date of Birth:

Home Address:

Postal Address:

Email Address:

Full Name of Spouse:

Spouses Date of Birth:

Date of Marriage (if married during the year):

Spouses Taxable Income 2023:

If Alexander Spencer is not preparing your partners tax return, please provide us with their taxable income as their income may be required to be recorded in your tax return.

Your Bank Account Details (to receive any tax refunds electronically)

Account Name:

BSB (Must be 6 digits)

Account Number:

Income Details

1. Payment Summaries/Income Statements (including pensions & Centrelink)

How many Payment Summaries/Income Statements do you have for 2023 financial year? _____

It's important to wait until your employer finalises your income statement to make it 'tax ready' before we lodge your tax return.

Most employers have until 31 July to finalise your income statement for the year.

2. Other Salary Income (includes any directors' fees, commissions, tips etc.)

3. Termination Payments (if you received a lump sum termination payment, please provide Eligible Termination Statement – ETP Statement) Yes No

4. Interest (money received on your bank accounts)

	Name of Bank	Account No	Total Interest Received	TFN Withholding	Joint Account?	
1					Yes	No
2					Yes	No
3					Yes	No

5. Dividends
Did you receive dividends during the financial year? Yes No

Please provide copies of dividend statements of income received. Also note that if on the dividend reinvestment plan (DRP) which means you don't physically receive dividends (the company uses that money to buy you more shares) that is still income and must go into your tax return.

6. Trusts Distributions and Partnership Income (i.e. examples of trusts are public funds or unlisted/family trusts). Name of trust or partnership – Please provide documents including year end Tax Statements to show income from the funds you list.

1

2

3

7. Capital Gain – Did you sell any assets such as shares, cryptocurrency, vacant land or investment properties which were acquired after 20 September 1985? If yes, then please attach documentation of when it was purchased, its cost, and any documents relating to its sale or the funds received.
- Yes No
8. Rental Income – Please attach details of the rent received and all expenses in their separate categories. A Rental Property Schedule is available from our website for your convenience. Please supply settlement sheets and purchase documents for properties if applicable.
Should you require the services of a Quantity Surveyor for a depreciation report please contact us for a referral of the firm we use.
List of rental properties, all information attached:
9. Foreign Income
Did you receive foreign income/salary? – please attach all relevant documentation. Yes No
- Did you receive any Foreign Dividends? If yes, please provide statements. Yes No
10. Any Other Income Including Cryptocurrency - Any other income you received in the financial year which doesn't fit into any of the above categories - please provide details.

Deduction Details

Please ensure you can substantiate all claims.

1. Motor Vehicle
- Were you required to use your own car for business/work purposes during the year? Yes No
- If yes, then please provide information for either (a) or (b) below.

(a)Logbook Method: What is the business % use per your logbook?
You must keep a logbook for a minimum of period of 12 continuous weeks and it must be less than 5 years old. Ensure you have all expense receipts.

Please provide details of all expenses you incurred over the financial year under the following categories:

Expense Type	Amount (\$)
Fuel <i>(please keep all receipts)</i>	
Insurance	
Registration	
Services/Repairs/Tyres	
Loan Interest or lease payments (if applicable)	
- if you have hire purchase or lease, please attach paperwork	
Other - please specify:	
Cost of Vehicle: Date of Purchase:	

(b)Cents Per Kilometre Method: How many business kilometres did you travel during the year (up to 5000 kms) Kilometres? Please ensure you can justify your claim with explanatory diary records or a logbook.

2. Work Uniform
- Do you wear a logo uniform or require protective clothing? Yes No

If yes, please provide the costs associated with purchasing and maintaining the uniform, e.g. laundry (up to \$150 without receipts, but with justification) cost of protective clothing such as work boots, sunscreen, hats, eye protection. You must have all receipts.

3. Donations (Please ensure the receipt states Tax Deductible)
- N/A ☐

Name of Body	Amount (\$)

4. Tax Agent Fees (from previous year, 2022 FY):

5. Interest & Dividend Deductions

Description	Amount (\$)
Interest on dividend or other investment income	
Cost of investment advisor	
Reference Material	
Other – please specify:	

6. Other Work-Related Deductions – please provide details and ensure you have kept all receipts and diary records.

Description	Amount (\$)
Diary, stationery, work materials	
Union Fees / Professional Body memberships	
Mobile Phone (total cost per month multiplied by work related %)	
Tools and equipment (costing \$300 or less, only)	
Tools and equipment (costing more than \$300)	
- Please attach all documents/receipts for depreciation	
Seminars & short courses	
Income protection insurance (note: life insurance is not tax deductible)	
- Please attach notice from insurer	
Subscriptions	
Other - please specify:	

7. Home Office Expenses, including Working from home.

Please complete all questions below where possible.

(i) Were you required to work from home?

Yes

No

(ii) How many hours did you work from home? You must be able to provide a record/diary in an audit situation.

Total hours worked from home between 01 July 2022 - 30 June 2023:

(iii) Were you required to use your own internet connection to perform your work?

Cost of internet per month:

Your work-related portion of internet usage, as a percentage or a dollar value:

How many people in your household were using the internet connection concurrently? Please detail.

(iv) There are two methods available to work out your 'work from home' tax deduction. One of these methods requires you to provide your gas and electricity bills incurred during 01 July 2022 - 30 June 2023.

Total gas costs incurred during 01 July 2022 - 30 June 2023: (or attach all bills)

Total electricity costs incurred during 01 July 2022 - 30 June 2023: (or attach all bills)

Provide area of room as a % of total area of property:

Please list any computer equipment or office furniture purchased during the year supply receipts:

Description	Date of Purchase	Cost	Work-related %

8. Work Related Travel Expenses

8a. Please detail local travel for work purposes i.e. taxis, public transport, tolls and parking, car hire fees.

8b. International / interstate / interstate trips for work purposes i.e. airfares, accommodation, meals and incidentals, taxi fares, visa application fees. Please note: You must keep a travel logbook for trips of 6 or more consecutive nights.

9. Other (Any costs that were directly related to your job – please provide details)

10. Self-education Expenses include seminar costs, textbooks, stationery, student union fees, course fees (except HECS/HELP), depreciable items used for self-education purposes e.g. Computer, Reference library

Description	Amount (\$)

Please advise the connection between your course/studies and your current employment

Tax Offsets & Rebates

1. Superannuation – New Rules

(a) From 1 July 2017 individuals may claim a tax deduction for personal contributions made into super. Did you make a super contribution into a complying superannuation fund between 01 July 2022 and 30 June 2023?

Yes No

Amount contributed to super

Have you given a valid written notice in the approved form to your receiving super fund? Yes No

Has your receiving super fund provided you with a written acknowledgement of your notice? Yes No

(b) Have you made any personal, after-tax, contributions to your superannuation fund? Yes No

If so, you may be entitled to super co- contributions of up to \$500 (conditions apply). We do not require any information for your tax return as the process to claim this is automatic between the Australian Taxation Office and your superfund upon lodgement of your tax return.

(c) Have you made superannuation contributions on behalf of your spouse? Yes No

Other Information

Were you an Australian resident for tax purposes for the entire year? If no, please call to discuss this issue as residency is a potentially complex area. Yes No

Did you stop full-time education during the 2022/2023 year? Yes No

Did you live in a remote area or serve in the defense forces during the 2022/2023 year? Yes No

Other: Please list any other information which you are unsure of, or which you would like us to be aware of. Please use this space to include details of expenses if not enough space was available in the previous sections.