



# Knights Norfolk

BUSINESS NAVIGATION  
& TAX CONSULTING

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Knights Norfolk  
is a CPA Practice

## End of Year Checklist - Individual

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

Postal Address: \_\_\_\_\_

Phone number: \_\_\_\_\_

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

Occupation/Job description: \_\_\_\_\_

Would you like your fee be deducted from your return? Y  N

Please provide banking details for the balance to be deposited into:

BSB \_\_\_\_\_ Account Number \_\_\_\_\_

**To ensure fast processing of your return, this checklist must be completed and returned to our office as soon as possible – Work will commence once all information has been received.**

**Please tick any that apply & provide a summary or copies of receipts.**

### **Work Related Tax Deductions**

**Please note: The ATO have indicated that they are increasing audit activity for Work Related Expenses. It is important that you can substantiate and provide evidence for any claims. You need to keep any receipts as evidence for two years after lodging your return.**

Work Related Car Expenses (Logbook or km's relating to work – Travel from home to work is not claimable)

Compulsory Uniform (with logo)/Protective clothing/UV Protection/Industry Specific

Work Related Travel Expenses (Accommodation, Overnight living expenses including Meals)

Education expenses directly related to your current work (Course Fees, Materials, & Travel etc.)

Union Fees (Please provide, invoice or payslip showing union fees deduction)

Professional Memberships

Phone & Internet Expenses (Please advise of usage amount. It can be daily, weekly, monthly or percentage of bill) Please provide bill/invoice for evidence.

Tools & Equipment Expenses (including computer & mobile, please provide receipts and work-related percentage)

Home Office Expense (Please state average hours worked per week and how many weeks for the year)

Home Office furniture & equipment (if applicable) (Please provide receipts)

Seminars & Education events

Journals/Trade Magazines

- Donations (Please provide receipts – must be registered tax deductible gift recipient)
- Tax Agent Fees (new clients only)
- KM's travelled to see Tax Agent
- Income Protection Insurance
  
- Rental Property Income/Expenses (if applicable)**
  - How many weeks was the property available for rent & how many of those weeks was it rented?
  - Rental Income Statements from Agent
  - Shire & Water Rates
  - Insurance Policies
  - Loan Statements
  - Repairs & Maintenance Invoices
  - Asset/Minor Equipment Purchase or improvements Invoices.
  - Other rental property expenses (e.g. body corporate, land tax etc.)
  
- Centrelink Payment Details (if applicable - Youth Allowance/Newstart Allowance/Age Pension etc)**
  
- Family Tax Benefit**
  - Have you received Family Tax Benefit this financial year? Y/N
  
- Child Support**
  - Have you paid child support this financial year? If so, how much? \_\_\_\_\_
  
- Bank Interest Received**
  - End of financial year bank statements or interest summaries can be requested from your bank.
  
- Dividend Statements and Crypto/FOREX Tax Statements (if applicable)**
  
- Trust, Partnership or Company income (That are not prepared though Knights Norfolk, if applicable) this includes investment portfolios.**
  
- Income Statements/PAYG Payment Summaries/Group Certificates – please provide list of Employers (so we can cross reference with ATO pre-filing)**

**If you have any questions, please don't hesitate to contact our office on 03 5495 2166**