

Personal Details



COOPER'S
ACCOUNTING

If you are **new client** please fill out all sections

If you are a **returning client** please only fill out any changes to your details

When complete you can easily just upload to our website **here** or alternatively email it back to us at admin@coopersaccounting.com.au

Full Name:	
Full Address:	
Tax File Number:	
Date of Birth:	
ABN if a business:	
Home Phone:	
Mobile Number:	
Email Address:	
Main Occupation:	
Resident for tax purposes	IF NO state date arrived

Bank Account Details -are necessary for refunds as ATO will no longer send cheques and cannot lodge tax return without them

Account Name:
BSB:
Account Number:


Spouse's Details if Applicable
Full Name:
Date of Birth :
Spouses Gender:
Spouse's taxable Income for current year:

PO BOX 3073 Thornton, NSW 2322

Office: 02 4932 4589 Mobile: 0431 204 033

Email: Helen@coopersaccounting.com.au Website: www.coopersaccounting.com.au

General checklist

 THIS CHECKLIST WILL HELP YOU COLLECT TOGETHER ALL THE RECEIPTS, TAX INVOICES AND SUPPORTING DOCUMENTS YOU'LL NEED TO SUPPLY US FOR YOUR TAX RETURN.
Upload your documents directly to us [HERE](#)

INCOME *Please upload copies of income [HERE](#)*

- ☐ PAYG Summaries
- ☐ Pensions or government payments/allowances
- ☐ Interest earned for the relevant year from your banks, building societies etc.
- ☐ Dividend statements
- ☐ Details of rental property income [CHECKLIST HERE](#)
- ☐ Details of any business income [CHECKLIST HERE](#)
- ☐ Details of any other income earned

GENERAL WORK EXPENSES

- ☐ Personal car expenses (logbook and all expense items.)
 - Fuel \$ _____
 - Repairs and Maintenance \$ _____
 - Registration and insurance \$ _____
 - Cleaning \$ _____
 - Interest on finance \$ _____
 - Starting odometer _____ Km
 - Closing odometer _____ Km
 - Total _____ Km's for work in period
- ☐ Travel expenses (flights, taxis, train and bus fares for attending training courses, trade fairs etc.)
 - Cost \$ _____
 - Details _____
- ☐ Phone costs \$ _____ work usage _____%
- ☐ Computer/laptop expenses (Lease or purchase)
 - Cost \$ _____
 - Date of purchase _____
 - Work usage _____%
- ☐ Internet cost \$ _____ p/m Work usage _____%
- ☐ Home office hours _____ per week for _____ weeks of the year
- ☐ Work related self education expenses
 - Course name _____
 - Institution _____
 - Fees \$ _____
 - Books and resources \$ _____
 - Internet \$ _____ work usage _____%
 - Study hours at home _____ per week - _____ Km's to Learning Institution

- ☐ Laundry _____ washes per week, for _____ weeks/year
- ☐ Monogrammed or protective Uniforms
 - Shirts \$ _____
 - Pants (protective not business attire) \$ _____
 - Masks \$ _____
 - Hats (hard hats, sunhat etc) \$ _____
 - Sunglasses (if working outdoors) \$ _____
 - Sunscreen (if working outdoors) \$ _____
 - Steel cap boots \$ _____
 - Other PPE \$ _____
 - Other \$ _____ Details _____
- ☐ Union Fees \$ _____
- ☐ Printing and Stationery \$ _____
- ☐ Tools and equipment
 - Cost per item \$ _____ Details _____
 - Date purchased on items over \$300 _____ \$ _____ Details _____
 - Date purchased on items over \$300 _____ \$ _____ Details _____
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 - Date purchased on items over \$300 _____ \$ _____ Details _____
- ☐ Workplace Tickets (WWCC, First Aid, NDIS, Police check, contractors license, forklift ticket..)
 - Cost \$ _____ Type _____
 - Cost \$ _____ Type _____
 - Cost \$ _____ Type _____
- ☐ No. of Dependant Children in your care _____
- ☐ Does Your Child attend a Private school?
 - If Yes, you can claim your school building fund levy.
 - Cost \$ _____ School _____



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NOT SURE ABOUT
SOMETHING?
Contact us directly from
our website [here](#)

KEEP TRACK OF
YOUR RECEIPTS



TAKE A PHOTO OF
RECEIPTS AND TAX
DOCUMENTS AND
UPLOAD THEM DIRECTLY
TO US [HERE](#)

General checklist Continued

OTHER EXPENSES AND RECORDS

- ☐ Last year's tax return
 - Fee \$ _____
 - Name of Accountant _____
- ☐ Income protection insurance premiums (paid outside of Superannuation)
 - Amount \$ _____
 - Fund Name _____
 - Membership No. _____
- ☐ Personal Super Contributions
 - Amount \$ _____
 - Fund Name _____
 - Membership No. _____
 - Have You filled out an intent to claim form?
 - If **Yes** Upload response to your form [HERE](#)
- ☐ -If **NO** Download form [HERE](#) or [ASK US](#) for help
 - Forms need to be lodged with your super fund and response provided to us before we can claim in your tax return
- ☐ Private health insurance details **Please upload your statements [HERE](#)
- ☐ Details of any government debts (Child support, Centrelink etc.) \$ _____ amount owing
- ☐ Child Support Paid \$ _____
- ☐ Charity donations
 - Cost \$ _____ Charity name _____
 - Cost \$ _____ Charity name _____
 - Cost \$ _____ Charity name _____
 - Cost \$ _____ Charity name _____
 - Cost \$ _____ Charity name _____

****If you have shares, rental properties, crypto currency, business income, foreign income or anything else not listed on this form that can't be provided in the extra notes. Contact us [HERE](#) for further checklists or information**



Please note

Logbooks or diary evidence is required for all motor vehicle claims, 4 week diaries are required for phone, Internet and home office usage calculations, and all receipts are required for other claims. These documents must be kept by you for 5 years from date of lodgment.

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Questions to ask accountant...

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