### **Personal Details**



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 <u>here</u> or alternatively email it back to us at admin@coopersaccounting.com.au

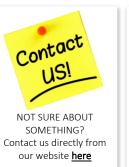
Full Name:	
Full Address:	
Tax File Number:	
Date of Birth:	
ABN if a business:	
Home Phone:	
Mobile Number:	
Email Address:	
Main Occupation:	
Resident for tax purposes	IF NO state date arrived

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

Acount Number:

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







weeks/vear

# 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 <u>HERE</u>

Laundry

#### 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 fairs 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

_	
	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 PPF \$
	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
	-Date purchased on items over \$300
	\$ Details
	-Date purchased on items over \$300
	\$ Details
	-Date purchased on items over \$300
	\$ Details -Date purchased on items over \$300
	\$ Details -Date purchased on items over \$300
	\$ Details
	-Date purchased on items over \$300
	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

washes per week, for

PO BOX 3073 Thornton, NSW 2322

Office: 02 4932 4589 Mobile: 0431 204 033

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





NOT SURE ABOUT SOMETHING? Contact us directly from our website <u>here</u>

Extra Motes

TAKE A PHOTO OF RECEIPTS AND TAX DOCUMENTS AND UPLOAD THEM DIRECTLY TO US <u>HERE</u>

KEEP TRACK OF YOUR RECEIPTS

## 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 <b>Yes</b> Upload response to your form <u>HERE</u>
	-If <b>NO</b> Download form <u>HERE</u> or <u>ASK US</u> for help
	<ul> <li>Forms need to be lodged with your super fund and</li> </ul>
	response provided to us before we can claim in your tax
_	return
	Private healthinsurance details **Please upload your
_	statements HERE
	Details of any government debts (Child support, Centrelink
_	etc.) \$ amount owing
Ľ.	Child Support Paid \$
	Charity donations
	-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.

Questions to ask accurtant.

PO BOX 3073 Thornton, NSW 2322 Office: 02 4932 4589 Mobile: 0431 204 033 Email: Helen@coopersaccounting.com.au Website: www.coopersaccounting.com.au