



LMH ACCOUNTANTS

Accounting - Income Tax - GST - Business Advice

TAX RETURN CHECKLIST

Please note this is intended as a general guide only, you should provide us with any and all information relating to your income and expenses.

Want to send us your tax return details online? Use this QR Code



GENERAL INFORMATION

*Existing clients, please **only supply general details if they have changed** since your last tax return was prepared*

- Tax File Number
- Full name
- Home address
- Postal address
- Date of birth
- Mobile phone
- E-Mail address
- Bank Details for any tax refunds
- Occupation
- Residency for Tax (Australian, Foreign, Working Holiday Maker)
- Spouse's name, date of birth & taxable income
- Number of dependent children

*New Clients – we must sight photo identification (drivers license, passport etc.)

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INCOME

- Salary & wages
- Allowances, directors fees, bonuses etc.
- Employer lump sum payments
- Employment termination payments
- Australian Government allowances & payments & pensions
- Australian annuities & superannuation income streams/lump sums
- Australian Government grants, subsidies or other payments
- Attributed personal services income
- Interest earned from bank accounts & investments
- Dividends received or reinvested
- Employee share schemes
- Distributions from partnerships or trusts
- Income & expenses from operating under an ABN (sole trader)
- Farm management deposits or withdrawals
- Capital gains or losses such as:
 - Selling a property
 - Selling shares
 - Selling cryptocurrency, NFT's or other digital assets
 - Selling any other investments
 - Note! Capital gains need to be reported when the contract is signed, not when settlement occurs.
- Foreign income
- Rental property income & expenses
- Bonuses from life insurance companies

Forestry managed investment scheme income

Income from insurance payouts

Other income

DEDUCTIONS

[Work related car expenses](#)

Cents per km method or Logbook method

Please provide either:

- No of km's travelled for work purposes; OR
- What % of your vehicle is work related based on your logbook AND
 - Fuel Costs
 - Insurance & Registration Costs
 - Repair & Maintenance Costs
 - Purchase invoice & finance documents for your vehicle

[Work related overnight travel expenses](#)

[Work related uniforms & clothing expenses](#)

[Work related self education expenses](#)

[Other work related expenses](#) including what % of these is work related:

- Seminars & courses
- Home office expenses (running expenses and/or number of hours worked)
- Computers & software
- Phone & internet
- [Tools & equipment](#)
- Subscriptions, union fees or professional fees
- Depreciation (we will calculate the correct amount to claim)

Investment expenses

Donations

Accountancy and tax agent expenses

UPP (for foreign pensions or annuities)

Personal superannuation contributions

You must have completed and provided your fund with a [notice of intention to claim a tax deduction](#)

Income protection insurance

Forestry management investment scheme deductions

OTHER INFORMATION

[Number of days you lived in a remote area](#)

Private health insurance statement