



NAME: _____

TAX ENVELOPE – YEAR _____

WORK EXPENSES

(As you put your receipts in this envelope, record the details in the appropriate box)

<i>Work Related Expenses e.g. Stationery/Tools, Mobile phone, Subscriptions, Home office</i>
TOTAL \$
<i>Uniforms/Protective Clothing</i>
TOTAL \$
<i>Self-Education Expenses e.g. Books, computer costs, course fees</i>
TOTAL \$
<i>Work Travel Expenses e.g. flights, accommodation, meals</i>
TOTAL \$
<i>Donations</i>
TOTAL \$
<i>Last Year's Tax & ongoing Financial Planning fees</i>
TOTAL \$

CAR EXPENSES

Claiming Cents per KM method – If you use your car occasionally for work, rather than keep a record of all your costs, just record the number of KM's travelled.

TOTAL KM's: _____

Log Book Method (% of Actual Expenses)

Required to keep a Log Book for a 12 weeks period every 5 years or earlier if usage changes

<i>Fuel</i>
TOTAL \$
<i>Car Registration & Insurance</i>
TOTAL \$
<i>Repairs & Maintenance</i>
TOTAL \$
<i>Lease payments or Loan Interest</i>
TOTAL \$
<i>Other (e.g RAA, Cleaning)</i>
TOTAL \$
TOTAL Car Expenses \$

TAX RETURN ESSENTIALS

- ✓ Your Tax File Number/ABN
- ✓ Date of Birth
- ✓ Occupation
- ✓ Bank Account Details
- ✓ Home & Postal Address
- ✓ Email Address
- ✓ Telephone &/Or Mobile Number
- ✓ Your Spouse's Name & Date of Birth

EXAMPLES OF WHAT TO BRING

- ✓ PAYG Payment Summaries (Group Certificates, Early Termination Payments, Fringe Benefit Tax)
- ✓ Interest earned from Bank Accounts
- ✓ Work Expenses (See itemised list next column)
- ✓ Dividend Statements &/or Sale of Shares – Cost Price & Date Purchased; Sale Price & Date sold
- ✓ Annual Tax Summaries for Managed Funds (may not arrive until August/Sept)
- ✓ Rental Property Income & Expenses
- ✓ Foreign Income
- ✓ Number of days living in a remote area (Zone or Overseas tax offset)
- ✓ Private Health Fund Statement
- ✓ Spouse's Taxable Income

SMALL BUSINESS/SELF EMPLOYMENT

- ✓ Income
- ✓ Expenses (including Logbook, Home office expenses, income protection insurance)