



TAX RETURN CHECKLIST

NOTE: If you own a rental property, please refer to the **Rental Property Schedule**

PERSONAL DETAILS

Name: Zaid Al Dabbag	Occupation: Engineering	
Phone No:	Mobile: 0473560032	
Your Tax File Number: 555 504 111	Your Date of Birth: 30/05/1979	
Email Address: zaid.m.alldabbag@gmail.com		
Home Address: 11 Abbingdon Avenue, Cheltenham, 3192 Victoria		
Postal Address: 11 Abbingdon Avenue, Cheltenham, 3192 Victoria		
Full Name of Spouse: Somoud Al Masri	Spouses Date of Birth: 27/05/1981	
Date of Marriage (if married during the year):	Spouse Taxable Income:	
<i>If we are not preparing your partners tax return, please provide us with their taxable income as their income may be required to be recorded in your tax return.</i>		
Your Bank Account Details (to receive any tax refund electronically)		
BSB (Must be 6 digits)	Account Number	Account Name
063001	11135842	Somoud Al Masri and Zaid Al Dabbag

INCOME DETAILS

Payment Summaries/Income Statements (including pensions & Centrelink)

☒ Yes ☐ No

How many Payment Summaries / Income Statements do you have for this financial year? _____

It's important to wait until your employer finalises your income statement to make it 'tax ready' before we lodge your tax return. Most employers have until 31 July to finalise your income statement for the year.

Other Salary Income (includes any directors' fees, commissions, tips etc.)

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Termination Payments (if you received a lump sum termination payment please provide Eligible Termination Statement – ETP Statement)

Applicable?

☐ Yes ☒ No

Interest (money received on your bank accounts)

Name of Bank	Account No.	Total Interest Received	TFN Withholding	Joint Account?
				☐ Yes ☐ No
				☐ Yes ☐ No

Dividends

Please provide copies of dividend statements of income received. Also note that if on the dividend reinvestment plan (DRP) which means you don't physically receive dividends (the company uses that money to buy you more shares) that is still income and must go into your tax return.

Name of Shares	No. Shares Held	Amount Received

INCOME DETAILS

Trusts Distributions and Partnership Income (i.e. examples of trusts are public funds or unlisted/family trusts). Name of trust or partnership – Please provide documents including yearend Tax Statements to show income from the funds you list.

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Capital Gain – Did you sell any assets such as shares, vacant land or investment properties which were acquired after 20 September 1985? If yes, then please attach documentation of when it was purchased, its cost, and any documents relating to its sale or the funds received.

Applicable?

☐ Yes ☐ No

Rental Income – Please attach **details** of the rent received and all expenses in their separate categories. Please complete the Rental Property Schedule.

Please supply settlement sheets and purchase documents for properties if applicable.

Should you require the services of a Quantity Surveyor for a depreciation report please contact us for a referral of the firm we use.

List of rental properties, all information attached:

[Villa 38, Street 9, Springs 2 Dubai, UAE](#)

Foreign Income

Did you receive foreign income/salary? – please attach all relevant documentation.

☐ Yes ☒ No

Did you receive any Foreign Dividends? If yes, please provide statements.

☐ Yes ☒ No

Any Other Income (Any other income you received in the financial year which doesn't fit into any of the above categories - please provide details).

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DEDUCTION DETAILS

Please ensure you are able to substantiate all claims.

Motor Vehicle – Were you required to use your own car for business/work purposes during the year?

☒ Yes ☐ No

Make/Model: [Honda/ Odyssey](#) Registration number: [1PA5UI](#)

If yes, then please provide information for either (a) or (b) below.

(a) Log Book Method: What is the business % use per your logbook? _____

You must keep a logbook for a minimum of period of 12 continuous weeks and it must be less than 5 years old. Ensure you have **all** expense receipts.

Please provide details of all expenses you incurred over the financial year under the following categories:

Expense Type	Amount
Fuel (please keep all receipts)	
Insurance	
Registration	
Services/Repairs/Tyres	
Loan Interest or lease payments (if applicable) – if you have hire purchase or lease please attach the paperwork	
Other – please specify:	
Cost of vehicle: _____ Date of purchase: _____	

(b) Cents per kilometer method: How many business kilometers did you travel during the year (up to 5000 kms) Kilometres? Please ensure you can justify your claim with explanatory diary records:

DEDUCTION DETAILS

Work Uniform

Do you wear a logo uniform or require protective clothing?

☐ Yes ☒ No

If yes, please provide the costs associated with purchasing and maintaining the uniform, e.g. laundry (up to \$150 without receipts, but with justification) cost of protective clothing such as work boots, sunscreen, hats, eye protection. **You must have all receipts.**

Donations

☐ Yes ☐ No

Name of Body	Amount

Tax Agent Fees (from previous financial year): _____

Interest & Dividend Deductions

Description	Amount
Interest on dividend or other investment income	
Cost of investment advisor	
Reference Materials	
Other – please specify:	

Other Work-Related Deductions – please provide details and ensure you have kept **all** receipts and diary records.

Description	Amount
Printing and Stationery	
Union Fees / Professional Body Memberships	
Mobile phone (total cost per month x work-related %)	
Books, Journals and Magazines	
Tools and equipment	
Seminars & short courses	
Income protection insurance (note: life insurance is not tax deductible)	
Subscriptions	
Computers & Software	
Other – please specify:	

DEDUCTION DETAILS

Home Office Expenses

For each applicable claim, please describe your **reason** for claiming and show **how you have calculated** the amount.

COVID-19: Were you required to work from home due to COVID-19? ☐ Yes ☒ No

If yes, from what date did you commence working from home? 24/2/2020

Use of **internet access** for work purposes

Use of **home phone** for work purposes

How many hours per week do you spend working at home? You must be able to provide a 4-week representative diary log in an audit situation. Please exclude annual leave and sick days.

If you would prefer to claim a portion of the work-related portion of your electricity & gas expenses, please tick this box and we will contact you to discuss the information required ☐ **Yes**

Please list any computer equipment or office furniture purchased during this financial year and/or supply receipts:

Description	Date of Purchase	Cost	Work-related %

Work Related Travel Expenses

Please detail local travel for work purposes i.e. taxis, public transport, tolls and parking, car hire fees.

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International / interstate / interstate trips for work purposes i.e. airfares, accommodation, meals and incidentals, taxi fares, visa application fees. *Please note:* You must keep a travel logbook for trips of 6 or more consecutive nights.

Other (Any costs that were directly related to your job – please provide details)

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Self-education Expenses

Expenses include seminar costs, text books, stationery, student union fees, course fees (except HECS/HELP), depreciable items used for self-education purposes e.g. Computer, Reference library

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Please advise the connection between your course/ studies and your **current** employment

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TAX OFFSETS & REBATES

Do you have private health insurance?

☐ Yes ☐ No

If yes, please provide us with a copy of the health fund statement.

Superannuation – new rules

From 1 July 2017 individuals may claim a tax deduction for personal contributions made into super.

Did you make a super contribution into a complying superannuation fund this financial year?

☐ No

☐ Yes

Amount contributed to super _____

Have you given a valid written notice in the approved form to your receiving super fund? ☐ Yes ☐ No

Has your receiving super fund provided you with a written acknowledgement of your notice? ☐ Yes ☐ No

Have you made any personal, after-tax, contributions to your superannuation fund? If so, you may be entitled to super co- contributions of up to \$500 (conditions apply). We do not require any information for your tax return as the process to claim this is automatic between the Australian Taxation Office and your superfund upon lodgment of your tax return.

☐ Yes ☐ No

Have you made superannuation contributions on behalf of your spouse?

☐ Yes ☐ No

OTHER INFORMATION

☐ Yes ☐ No

☐ Yes ☐ No

☐ Yes ☐ No

☐ Yes ☐ No

Or make an appointment at our office on **0413 039 528**