

# Baggott Bridge Partners

## Individual Checklist

## 2024 Tax Return

**Client Name:** \_\_\_\_\_  
**Address:** \_\_\_\_\_  
**Phone:** \_\_\_\_\_  
**Fax:** \_\_\_\_\_  
**Email:** \_\_\_\_\_

**Date of Birth:** \_\_\_\_\_  
**Tax File Number:** \_\_\_\_\_  
**ABN:** \_\_\_\_\_  
**Occupation:** \_\_\_\_\_  
**Marital Status:** \_\_\_\_\_

INCOME	Amount	DEDUCTIONS	Amount
Salary or wages			
Reportable Fringe Benefits		<b><u>Work Related Uniforms</u></b>	
Allowances, tips, earnings		- Protective Clothing	
Eligible Termination Payments		- Occupational Clothing	
Lump Sum Payments		- Compulsory Uniform	
Interest from Bank Accounts		- Covid supplies	
Australian Government Pensions		- Laundry & maintenance	
Aust Government Annuities, including superannuation pensions		- Dry Cleaning	
Dividends received		<b><u>OTHER</u></b>	
Managed Funds Distributions		Donations	
Capital Gains Profit / Loss		Tax Agents Fees	
- Sale of Property		Office Equipment & Computer exps	
- Sale of Shares		Computer (include date of purchase)	
Rental Property Income/Expenses		Internet plan & percent % of use	
Other Income		Calculators	
Centrelink Benefits		Home Office Expenses	
Business / Partnership / Trust Income		Home Office Furniture	
<b>REBATES</b>		iPad or Electronic organisers	
Carer offset		Professional Library or Textbooks	
Super Contribution / Income stream		Diary & Stationary	
Foreign income offset		Briefcase or Laptop Satchel	
Private Health Insurance Rebate		Professional Assoc Membership	
Zone Rebate		Conferences / Seminars	
Seniors & Pensioners tax offset		Mobile Phone plan, percent % of use	
Private Health Insurance Memb No.		Subscriptions	
Dependant Children		Income Protection Insurance	
Spouse - Date of Birth		Training or Sales Aids	
Spouse - Taxable Income		Interest Exp on loans / Bank Fees	
		Till shortages	
		Travel Fares - local & overseas	
		Accommodation & Meals	
<b>DEDUCTIONS</b>		Wet weather gear	
<b><u>Motor Vehicle</u></b>		Sun Protection products	
- Business Km's travelled		Tools of the Trade	
- MV Running costs & Logbook %		Union Fees	
- Parking fees / Tolls / Etag			
- New MV & Hire Purchase			
<b><u>Self Education</u></b>			
- Course Fees		- HELP Loan debt	
- Course travel		- Student Supplement Loan	
- Course textbooks		- PAYG instalments	
- Course internet			