

# Baggott Bridge Partners

## Individual Checklist

## 2020 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		<u><b>Work Related Uniforms</b></u>	
Allowances, tips, earnings		- Protective Clothing	
Eligible Termination Payments		- Occupational Clothing	
Lump Sum Payments		- Compulsory Uniform	
Interest from Bank Accounts		- Corporate Uniform	
Australian Government Pensions		- Laundry & maintenance	
Aust Government Annuities, including superannuation pensions		- Dry Cleaning	
Dividends received		<u><b>OTHER</b></u>	
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	
Other Income		Calculators	
Centrelink Benefits		Home Office Expenses	
Business / Partnership / Trust Income		Electronic organisers	
<u><b>REBATES</b></u>		Professional Library or Texts	
Child Care / Education Rebate exps		Diary & Stationary	
Super Co Contribution		Briefcase used for employment	
Spouse Rebate		Professional Assoc M/ship	
Private Health Insurance Rebate		Conferences / Seminars	
Zone Rebate		Mobile Phone	
Seniors & Pensioners tax offset		Subscriptions	
Private Health Insurance Memb No.		Income Protection Insurance	
Dependant Children		Training or Sales Aids	
Spouse - Date of Birth		Interest Exp on loans / Bank Fees	
Spouse - Taxable Income		Till shortages	
		Travel Fares	
<u><b>DEDUCTIONS</b></u>		Accommodation & Meals	
<u><b>Motor Vehicle</b></u>		Wet weather gear	
- Business Km's travelled		Sun Protection products	
- MV Running costs & Logbook %		Tools of Trade	
- Parking fees / Tolls / Etag		Union Fees	
- New MV & Hire Purchase			
<u><b>Self Education</b></u>		- HECS / HELP debt	
- Course Fees		- Student Supplement Loan	
- Course travel		- PAYG instalments	
- Course texts			
- Course internet			