



Bosco

CHARTERED ACCOUNTANTS

CLIENT NAME: _____

PLEASE ENSURE YOU HAVE THE RECEIPTS TO SUBSTANTIATE YOUR CLAIMS.
(We do not need to see them as long as you have them.)

INCOME RECEIVED:

- PAYG Payment Summaries
- Bank Interest or dividends (if any)
- Any other income you have received from **01/07/2021 - 30/06/2022** (e.g. Centrelink, pensions, rental, business income etc)
- Did you receive any capital gains or make any capital losses?

CLAIMABLE DEDUCTIONS

Have you used your own vehicle for the purpose of work (not to and from work, unless carrying bulky equipment or tools)?	KMs: Make: Model: Rego:
Have you had to travel for work and had out of pocket expenses for parking, trains, taxis or tolls? Were you out of pocket for any overnight accommodation or meals?	Total \$
How much have you spent on uniforms, dry-cleaning, hats, sunscreen, sunglasses or protective clothing/footwear?	Total \$
Have you had to do any work related courses that cost you money for fees, books, computer or stationary? Did you have to travel to classes or other reasons for your study?	Total \$
Any mess fees, union fees, association fees or license fees?	Total \$
Did you have costs relating to attending seminars?	Total \$
Did you purchase any books, magazine subscriptions or journals for work purposes?	Total \$
Do you have to take work home? If so, how many hours per week do you spend working at home?	Total Hrs:

Are you on call? How much do you spend per month on your phone and what is the work related percentage? Do you use your home internet for work? What is the monthly cost and what is the work related percentage? (Note: for phone and internet claims you will need to keep a diary for four weeks showing the work related usage)	Phone per mth: \$ (Work related) %: Home Internet per mth: \$ (Work related) %:
Did you buy a computer or any other electronic devices/hardware that is used for work? How much was it? What was the date of purchase? What is the work related percentage?	Total \$ Date of purchase: (Work related) %:
What else have you bought that was for work – tools, stationary, computer software etc.? If it is over \$300.00 what is the date of purchase and work related percentage?	Total \$ Date of purchase: (Work related) %:
Do you have income protection insurance?	Total \$
Did you make any gifts or donations?	Total \$
If you're a new client, how much did you pay last year to have your tax done?	Total \$
Are you in a health fund? If so, please provide the statement.	
Do you have a spouse? If so what is their name, DOB, how much did your spouse earn? Who do they work for?	Name: DOB: Employer: Income \$:
Do you have dependent children? How many?	No. Children:
Do you have a HECS, HELP, Trade Loans, SFSS or ATO debt? If so, how much?	Specify Type: Total \$
Did you pay child support, if so what was the total?	Total \$
Any other relevant information such as sale of property etc.	

Do you have any further questions/issues you would like to discuss?

Please note that for any expenses you want to claim in relation to your employment, if you are selected for audit by the ATO then they will request a letter from your employer confirming that the expenses were a requirement for your job.