



2020 INDIVIDUAL TAX RETURN CHECKLIST

Name	
Phone Number	
Address	
Email	
DOB	
Occupation	
Account BSB	
Account Number	

INCOME

Provide Statements if Applicable

Payment Summaries	Rental Property (See Checklist)
Lump Sum & Termination	Business Income (Call to discuss)
Government Payments	Foreign Income
Interest Income	Capital Gains (Did you sell any assets?)
Dividend Statements	Employee Shares
Annual Tax Statement for Managed Funds	Other

EXPENSES

Did you use a Motor Vehicle for work travel? <i>Call to discuss if unsure</i>	YES	NO
Did you work from a home office? <i>If yes, we will call to discuss your claim options</i>	YES	NO

Dream Financing Pty Ltd ABN: 89 618 906 602
 PO Box 775, Albany Creek QLD 4035
 Phone: 0423 030 533

Email: jordan@dreamfinancing.com.au

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Other Deductions (Ensure you keep receipts).

You can either send through your receipts or complete the table below. This list is not exhaustive so please contact us if you believe you have other deductible expenses to review

Deduction	Amount (\$)	Notes
Travel (Fares & Accom)		
Laundry		
Donations		
Self Education		
Unions & Registrations		
Tools (must provide receipts if > \$300)		
Subscriptions & Memberships		
Telephone (Provide work % Usage)		
Internet (Provide work % Usage)		
Income Protection Insurance		
Computer/ Laptop/ Ipad/ Phone Purchase (include amount and date of purchase)		
Other		

FINANCIAL & LOAN REVIEW

Woud you like a free review of your home loan?	YES	NO
Do you require a review of your personal superannuation and insurances (e.g. life and income protection)? <i>We have a referral partner we can recommend</i>	YES	NO

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OTHER

Did you have a spouse during the year?	YES	NO
Number of dependant children		
Did you have Private Health Insurance for the full financial year? <i>Usually we can obtain this information directly from the ATO</i>	YES	NO
Did you pay child support during the year? If so, how much		

I have also completed the following (tick)

- Individual Checklist for spouse
- Rental Property Checklist
- Motor Vehicle Expenses