



# Sangelictax Sangelictax

Angelo Sangiorgi b.bus (acc) MIPA  
Taxation and Accounting Services  
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Email: [angelo@sangelictax.com](mailto:angelo@sangelictax.com)  
Website: <http://www.sangelictax.com>  
“ Service with a Sangelic Touch ”

## 2010 Tax Returns Worksheet/Checklist

Please fill in the relevant information where applicable and have it ready when preparing your tax return

You can post it to me together with all your relevant tax records or you can scan it as a PDF document and emailed to the following address;

**[angelo@sangelictax.com](mailto:angelo@sangelictax.com)**

There are worksheets available on website; [www.sangelictax.com](http://www.sangelictax.com)  
Or I can email and/or send you a copy

This worksheet can pass on to other taxpayers who require their tax returns done

### Taxpayers Details;

Title :		
Tax File Number :		
Date of Birth :		
Occupation :		
Telephone :		
Mobile :		
Fax :		
Email Address :		
Postal Address :		
	State :	Postcode:
Home Address :		
	State :	Postcode:

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### **Family Details:**

**Please note\*\*\* if your spouse i.e. wife/de-facto partner was in receipt of Family Tax Benefit and/or their taxable income was less than \$9254 for year ending 30<sup>th</sup> June 2010 you MAY BE eligible to claim Spouse/Dependant Rebate in your tax return, subject to your taxable income, please provide the following details.**

Martial Status :
Name of Spouse/Defacto :
Tax File Number :
Date of Birth:
Taxable Income \$

Dependant Children	Date of Birth	Under 18 years Yes or No

**Please advise if your spouse/defacto is requiring having his/her Income Tax Return completed and then get another copy of this form to fill out.**

**\*\*Please fill in the above box provide me with number of children who attended either and/or primary/secondary school and the total amount payable of eligible education expenses for each child as you may be eiligible for Education Refund Tax Offset\*\***

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**Electronic Funds Transfer (EFT); Your Tax Refund can be directly credited to your nominated bank account please fill in the details below**

BSB Number :
Account Number :
Account Name:

### **Private Health Cover Details;**

Private Health Insurance	Yes / No	( if Yes please fill in following details)
Name of Health Fund :		
Membership Number of Fund :		
Type of cover : ( please circle the following cover applicable )		
H – Hospital		
C – Combination		
A – Ancillary		
Number of days covered as per statement:		
<b>If not sure what to fill in you can provide me with copy of the statement</b>		

## **INCOME**

**SALARIES/WAGES** (including ETP payments)

Employer Name	ABN	Tax Withheld \$	Gross Income \$
		\$	\$
		\$	\$
		\$	\$

**I need a copy of your PAYG payment summary or statement of income including ETP statements**

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## 2010 Tax Returns Worksheet/Checklist

### **INCOME**

**SALARIES/WAGES contd** (including ETP payments)

Employer Name	ABN	Tax Withheld \$	Gross Income \$
		\$	\$
		\$	\$
		\$	\$

**I need a copy of your PAYG payment summary or statement of income including ETP statements**

### **ALLOWANCES i.e. Motor Vehicle, Tool, Travel etc**

Employer	ABN	Tax Withheld \$	Allowance \$
		\$	\$
		\$	\$
		\$	\$
		\$	\$

**I need a copy of your PAYG payment summary or statement of allowances**

### **GOVERNMENT PENSIONS & ALLOWANCES i.e. Aged Pension, Newstart, Youth Allowance etc**

Received from	Tax Withheld \$	Allowance \$

**I need a copy of your Payment Summary or statement of allowances**

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### **INCOME**

#### **AUSTRALIAN ANNUITIES/SUPERANNUATION INCOME STREAMS & LUMP SUM PAYMENTS FROM SUPER FUNDS**

Received from	Tax Withheld \$	Allowance \$

**I need a copy of all documents relating to the tax status of your amounts received, including any Payment Summaries or statements of allowances, and details of any tax deductible amounts (“UPP”), and eligibility for tax offsets**

### **INTEREST INCOME**

Bank	BSB Number	Account Number	Account Name/s	Total \$	TFN Credits \$

**(Please record all Interest Received from various financial institutions i.e. Commonwealth Bank, ANZ, NAB etc for the relevant tax year as per bank statements \*\*Note \*\*if accounts are held in joint names please split amounts \*\*)**

**(See Interest Received Worksheet on website should have more bank accounts, or I can email and/or send you a copy)**

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### DIVIDENDS INCOME

<b>Company</b>	<b>Unfranked Dividends \$</b>	<b>Franked Dividends \$</b>	<b>Imputation Credits \$</b>	<b>TFN Credits \$</b>

**(Please record all your income from Share Trading i.e. BHP, ANZ, Rio Tinto, Wesfarmers etc for the relevant tax year as per your Dividend Payment Advice\*\* Note \*\*if dividends are held in joint names please split amounts \*\*)**

**(See Dividends Received Worksheet on website should have more dividends, or I can email and/or send you a copy)**

**\*\* Please Note if you provided your Tax File Number to the bank you must declare all investment income or else you will be penalised by the ATO \*\***

**\*\*It is not an offence not to provide your TFN as you are able to claim back TFN withholding credits when your tax return is lodged \*\***

### OTHER INCOME

**- Income from Partnerships / Trusts Distributions etc (please note Losses from Partnerships can be offset against any current year taxable income)**

**- Income from Self-employed businesses etc (please refer to Small Business Checklist on website or you can ask me to send you a copy)**

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## 2010 Tax Returns Worksheet/Checklist

### OTHER INCOME

- Foreign Income from overseas sources
- Foreign Income Australian Residents working overseas
- Foreign Income Australian Residents receiving overseas pensions
- Rental Property Income/Expenses
- Income Received from Rental Property

### Rental Property Deductions e.g:

- Interest on Bank Loans
  - Advertising
  - Bank Fees & Charges
  - Body Corporate Fees
  - Agents Commissions
  - Borrowing Expenses
  - Landlord Insurance
  - Gardening & Caretaking
  - Legal Fees
  - Letting Fees
  - Electricity & Gas
  - Rates & Taxes (Council Rates, Water Rates Land Tax)
  - Repairs & Maintenance
  - Travel Expenses
  - Depreciation on Capital Items i.e. Equipment
  - Building Allowances write off etc
- \*\* Please refer to Rental Property Worksheet on website, or I can email it and/or send you a copy \*\***

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## 2010 Tax Returns Worksheet/Checklist

### **EXPENSES**

#### **MOTOR VEHICLES**

**Motor Vehicles – 4 Types – you have the choice of the following methods which best suits your circumstances please refer to the relevant Motor Vehicle Worksheet options on the website or I can send you a copy**

**1. Set Rate Per Kilometre up to 5000kms method** – based on number of kilometres travelled without the need to keep records depending on the make/model engine size of motor vehicle up to and less than 5000kms for the year.

**2. 12% of original value method** – based 12% of the cost value of motor vehicle if brought outright.

If leased you can claim 12% of the market value at the time it was first leased. i.e. Original Cost \$50000\*12% = \$6000, travelled more than 5000kms, do not need written evidence.

**3. One-third of actual expense method** – this allows you to claim one-third of your expenses, you must written evidence i.e. kept petrol receipts, kilometres readings and make a reasonable estimate based on those records, travelled more than 5000kms

**4. Logbook method** – this method based on percentage usage claimed for motor vehicle expenses i.e. 60% work usage 40% private usage you must keep; a logbook of kilometres if travelled more than 5000kms, written evidence of motor vehicle expenses i.e. petrol, repairs, registration, insurance, leasing, depreciation, interest on loan etc.

**\*\*Note\*\* Please advised if you have acquired and/or sold a motor vehicle during the year**

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## 2010 Tax Returns Worksheet/Checklist

### TRAVEL EXPENSES

- Travel expenses; there are 2 Types of travelling expenses:

1. Motor vehicle expenses incurred in gaining or producing assessable income relating to motor vehicles other than cars (for example, motor cycles) and running expenses related to cars that are not held (such as borrowed cars); as previously referred in Motor Vehicle Expenses
2. Other travel expenses directly connected with the taxpayer's income-producing activities, such as air, bus, train, tram, taxi fares, bridge and road tolls, parking, car hire fees, airfares and accommodation.

**NOTE: The ATO will crackdown on the validity of domestic and overseas travel expenses especially in relation to connection of between the expenses incurred in producing taxpayer's assessable income. Also whether there is sufficient substantiation of to verify taxpayers to be able to determine whether travel is work-related or private in nature.**

### WORK-RELATED EXPENSES

Expenses	Expenses \$	Work Usage %	Amount to be claimed \$
i.e. Mobile Phone	\$ 500	Times 60.00%	\$ 300

**Using this example to figure out work-related expenses applicable to your occupation depending on work-related usage for various expenses**

Expenses	Expenses \$	Work Usage %	Amount to be claimed \$
Self Education	\$	Times %	\$
Union Fees	\$	Times %	\$

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## 2010 Tax Returns Worksheet/Checklist

### WORK-RELATED EXPENSES

Expenses	Expenses \$	Work Usage	%	Amount to be claimed \$
Laundry	\$	Times	%	\$
Seminars conferences	\$	Times	%	\$
Mobile Phone	\$	Times	%	\$
Books & Journals	\$	Times	%	\$
Subscriptions Registrations	\$	Times	%	\$
Uniforms Clothing	\$	Times	%	\$
Education & Training	\$	Times	%	\$
Travel Expenses	\$	Times	%	\$
Computer Expenses under \$300	\$	Times	%	\$
# Computer Expenses over \$300	\$	Times	%	\$
Equipment under \$300	\$	Times	%	\$
# Equipment over \$300	\$	Times	%	\$
Interest Deductions	\$	Times	%	\$
Donations	\$	Times	%	\$

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## 2010 Tax Returns Worksheet/Checklist

### **WORK-RELATED EXPENSES**

Expenses	Expenses \$	Work Usage	%	Amount to be claimed \$
Sundries/others	\$	Times	%	\$
Tax Agents Fees	\$	Times	%	\$
* <b>Home Office Running Expenses</b> - Electricity/Gas - Home Phone - Mobile Phone - Internet - Depreciation	\$	Times	%	\$
* <b>Home Office Running Expenses</b> - Rent - Mortgage Interest - Council Rates - Water Rates - Insurance	\$	Times	%	\$

The two broad categories of deductions relating to home office expenses that may be allowed to a taxpayer are **running expenses** and **occupancy expenses**

**\*\* Please refer to Work Related and Sundry Expenses Worksheet for further details on the website, or I can email it and/or send you a copy \*\***

**NOTE: The ATO will crackdown if there is not sufficient substantiation to verify taxpayers claim to be able to determine whether is work-related or private in nature.**

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## 2010 Tax Returns Worksheet/Checklist

### OTHER ITEMS

#### EDUCATION TAX REFUND OFFSET

You could be eligible to claim 50% refund for your children education expenses for your 2009 tax return;

For the period 1 July 2009 to 30 June 2010 the maximum you can claim for a child are 50% of eligible expenses up to;

- \$780 for each eligible child in primary school - that is, a refund of up to \$390
- \$1,558 for each eligible child in secondary school - that is, a refund of up to \$779

Eligibility rules;

- you had eligible education expenses for a child, **and**
- the child was in primary or secondary school, **and**
- you received Family Tax Benefit (FTB) Part A for the child, **or**
- a payment was made for the child that stopped you from receiving FTB Part A for that child, **or**
- your child stopped full-time school during the year and received sufficient income to stop you receiving FTB Part A.
- independents students are also eligible to claim Education Tax Refund

**NOTE:** if a taxpayer is entitled to a **Family Tax Benefit (FTB) Part A** payment for a child then that taxpayer is **only** eligible for the offset regardless of whether they are require to lodge a tax return for 2010.

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### EDUCATION TAX REFUND OFFSET

#### NOTE: examples of where you CAN ONLY claim education expenses

- laptops, home computers and associated costs
- computer-related equipment such as printers, USB flash drives, as well as disability aids to assist in the use of computer equipment for students with special needs
- home internet connections, including the costs of establishing and maintaining them
- computer software for educational use, including word processing, spreadsheet, database and presentation software, internet filters and antivirus software
- school textbooks and other paper-based school learning material, including prescribed textbooks, associated learning materials, study guides and stationery, and
- prescribed trade tools - for example, tools required to complete a school-based apprenticeship.

#### NOTE: the eligibility applies to primary and secondary students

**\*\*Please provide me with number of children who attended either and/or primary/secondary school and the total amount payable of eligible education expenses for each child \*\***

For those who are not required to complete an income tax return, a separate form will be available from the ATO to allow the refund to be claimed for the 2009-10 financial year **which will be posted on the website or you can ask for a copy.** The refund will be paid as a cheque or an electronic payment if you nominate a specific bank account.

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### OTHER ITEMS

#### SPOUSE/DEPENDANTS OFFSET

Spouse/Dependant Offset- you are entitled to an offset if you met the following points:

- you maintained your spouse/dependant during the 2009-2010 period i.e. you lived together, pay for their everyday essentials costs,
- your spouse was an Australia resident for tax purposes
- you were an Australia resident for tax purposes at any time in 2009-2010
- neither your spouse (if they were your spouse during that period) nor you were entitled to FTB Part B or were only entitled to it at the shared-care rate.

#### NOTE:

For the 2009-2010 income year, you are not eligible for the dependent spouse tax offset if your taxable income is over \$150,000.

You cannot claim a spouse tax offset for any period that you or your spouse (during any period they were your spouse) was entitled to family tax benefit (FTB) Part B at a rate based on having full care of a child (full-care rate). This rule applies even if neither you nor your spouse claimed FTB Part B when eligible to do so. \*\*\*\* **Please provide details if your spouse/dependant received Family Tax Payments the for the year \*\*\***

A spouse can be **married or de facto**.

If eligible you must provide the following;

Numbers of days in the tax year you maintain your spouse/dependants

Their Separate Net Income; i.e. salary wages, bonuses etc interest dividends income etc.  
The maximum offset is reduced by \$1 for every \$4, once this amount reaches a certain level i.e. **\$9254** the maximum offset is reduced to “nil” and will not be able to claim the offset.

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## 2010 Tax Returns Worksheet/Checklist

### SPOUSE/DEPENDANTS OFFSET

Child-Housekeeper Offset - you are entitled to an offset if you met the following points:

A housekeeper is a person who worked **full time** keeping house for you and cared for:

- a child of yours aged under 21 years, irrespective of the child's separate net income (SNI)
- any other child aged under 21 years (including a student aged under 21 years) who was your dependant and whose SNI was less than \$1,786
- your invalid relative who was your dependant and for whom you can claim a dependant tax offset
- your spouse who received a disability support pension.

Keeping house means more than simply child-minding or performing domestic duties. It includes having some responsibility for the general running of the household.

Separate Net Income; i.e. salary wages, bonuses etc interest dividends income etc. The maximum offset is reduced by \$1 for every \$4, once this amount reaches a certain level i.e. **\$9254** the maximum offset is reduced to “nil” and will not be able to claim the offset.

For the 2009-2010 income year, you are not eligible for the housekeeper tax offset if your taxable income is over \$150,000.

You did not have a spouse

You were **not** entitled to claim a [child-housekeeper tax offset](#).

- You were **not** entitled to family tax benefit (FTB) Part B or were only entitled to it at the shared-care You had a spouse who received a disability support pension
- You were **not** entitled to claim a [child-housekeeper tax offset](#).

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### SPOUSE/DEPENDANTS OFFSET

#### Child-Housekeeper Offset

You had a spouse who did not receive a disability support pension

- You were **not** entitled to claim a [dependent spouse tax offset](#) or a child-housekeeper tax offset.
- Your spouse and you were **not** entitled to FTB Part B or were only entitled to it at the shared-care rate

**\*\*\*\* Please provide details if your spouse/dependant received Family Tax Payments the for the year \*\*\*\***

#### NOTE: No reduction for Separate Net Income

The housekeeper tax offset is not reduced because the housekeeper derives separate net income; unless the level of income means that the taxpayer is not wholly engaged in keeping house for that taxpayer.

**\*\* Note \*\* I have included a Spouse (without dependent child or student), child housekeeper or housekeeper tax offset questionnaire which can be downloaded from the website, or I can email it and/or send you a copy \*\***

### MEDICAL EXPENSES OFFSET

You are entitled to a 20% rebate offset; total amount must be more than \$1500.00 to claim the rebate. The maximum offset is reduced by \$1 for every \$4 over \$1500 i.e;

$\$4000 - \$1500 = \$2500 * \$1 / \$4 = \$500$  claimable offset

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### PERSONAL SUPERANNUATION CONTRIBUTIONS

- Personal Superannuation Contributions made on behalf of spouse/de-facto

\*Note: Assessable income before deductions whilst adding reportable fringe benefits. This aggregate amount must be less than \$13,800 to receive any tax offset.

\*\*Note: In order to be eligible for the Spouse Tax Offset, the contribution must be un-deducted (i.e. no tax deduction is claimable)

- Personal Superannuation Contributions; co-contributions made on behalf of yourself

- Superannuation Contributions for self-employed/sole traders is deductible up to \$25,000 ; where **all** of the following conditions are met:

• The individual is either fully self-employed and not working under a contract principally for their labour, or is an employee for superannuation guarantee (‘SG’) purposes and less than 10% of their assessable income, reportable fringe benefits total and reportable employer superannuation contributions for the income year in which the contribution is made is from that employment.

If this applies to you can you provide me with details of your superannuation policy

### **Forms and Worksheet for 2010**

The following forms and worksheets can be downloaded from the Website or you can ask to have them sent to you such as;

- Motor Vehicle Worksheet

- Rental Property Worksheet

- Interest Received Worksheet

- Dividends Received Worksheet

- Cash Managed Funds Worksheet

- Share Trading Worksheet

- Work-Related and Sundry Expenses Worksheet

**For any other queries you may have please contact me**

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