

# 2023 Financial Year Tax Return Form and Checklist

***This form is for basic individual tax returns only.***

*Please fill in the fields below and supply the required documents by emailing [admin@ybab.com.au](mailto:admin@ybab.com.au).*

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## Personal Details (for new clients only)

Name: \_\_\_\_\_

Address: \_\_\_\_\_ State: \_\_\_\_\_ Postcode: \_\_\_\_\_

Tax File Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

## **BANK DETAILS** (disregard if your bank details have not changed)

BSB: \_\_\_\_\_ Account Holder: \_\_\_\_\_ Account Number: \_\_\_\_\_

## **SPOUSES DETAILS & INCOME** (REQUIRED if you have joint private health cover)

Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Taxable Income: \$ \_\_\_\_\_

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## Required Documents Checklist (Ensure all your tax documents are in MyGov and tax ready)

TAX READY - YOUR MYGOV MUST SAY 'TAX READY'

**OTHER INCOME** (Bank interest, dividends, govt. pensions & allowances,  
lump sum super payments, ETP)

**PRIVATE HEALTH INSURANCE STATEMENT**



## Work Related Deductions

**CAR TRAVEL** (**5000km annual limit** does not include driving to and from work).

*This will need to be justifiable if queried by the ATO and a diary/evidence of some kind kept .*

Total \_\_\_\_\_ **km's** @78c.

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**MOTOR VEHICLE** (IF NOT CLAIMING CENTS PER KM METHOD) (*Log book must be kept to calculate work VS private use percentage*) Commercial vehicles do not require a log book

Fuel: \$ \_\_\_\_\_ Rego: \$ \_\_\_\_\_

Insurance: \$ \_\_\_\_\_ Repairs & Maintenance: \$ \_\_\_\_\_

*If your car is financed, **loan documents** are required for interest & borrowing cost deductions.*

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**TRAVEL** (*Must have an itinery to prove and justify national & international work travel*)

Transport \$ \_\_\_\_\_

Accommodation: \$ \_\_\_\_\_

Meals \$ \_\_\_\_\_

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**SELF EDUCATION** (*relating to **current job only**, this cannot be for a new vocation, and it is not deductible if you have HECS or Govt. Loans*)

Cost: \$ \_\_\_\_\_ Traveled to and from study: \_\_\_\_\_ **km's**

Public transport costs \$ \_\_\_\_\_ Books & Resources \$ \_\_\_\_\_

Stationery: \$ \_\_\_\_\_

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**OTHER WORK RELATED DEDUCTIONS** (*Laptop, PC, tablet, mobile phone, tools, materials, stationery etc.*) **RECEIPTS MUST BE EMAILED TO ADMIN@YBAB.COM.AU PRIOR TO APPOINTMENT.**

Mobile: \$ \_\_\_\_\_ **per month** Percentage used for work: \_\_\_\_\_ %

Hours worked from home: \_\_\_\_\_ **per week**

Internet (if you work from home): \$ \_\_\_\_\_ **per month** Percentage used for work: \_\_\_\_\_ %

Tools (must supply receipts for tools over \$300): \$ \_\_\_\_\_ Subscriptions: \$ \_\_\_\_\_

Job Related Registrations & Licenses \$ \_\_\_\_\_

**OTHER WORK EXPENSES:** *(Please list the with description and cost)*



_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

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**UNIFORMS** *(All clothing to be work specific eg have a work brand or be protective clothing & **not general every day clothes**)*

Total: \$ \_\_\_\_\_

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**DONATIONS** *(Does not include raffle tickets, items purchased from charities or go fund me)*

Recipient: _____	\$ _____
Recipient: _____	\$ _____
Recipient: _____	\$ _____
Recipient: _____	\$ _____

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**PREVIOUS YEARS TAX AGENT FEES**

Total: \$ \_\_\_\_\_

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*Some of these documents may not be relevant to you, if you are unsure include them anyway. Once all the documents and information are received, we will then commence your tax return.*

Please contact us if you have any queries or you may want to check the ATO site below if you are unsure of your claims and if you are eligible for the deductions.

<https://www.ato.gov.au/Individuals/Income-and-deductions/Deductions-you-can-claim/>

<https://www.ato.gov.au/individuals/income-and-deductions/records-you-need-to-keep/>

Is it your responsibility and a legal requirement to ensure you have the relevant receipts and tax invoices to prove your claims if Audited or queried by the ATO.

I have agreed to engage Your Biz Accounting and Bookkeeping to prepare and lodge my tax return.

Name: \_\_\_\_\_ Signature: \_\_\_\_\_

Date: \_\_\_\_\_