



Francis A Jones[®]
Where people count.

FAJ TAX TIME WORKSHEET

Client Name _____	Number of dependant children _____	
Bank account details for tax refund	Dependant name/s _____	Date/s of birth _____
BSB _____ Account number _____	_____	_____
Spouse/de facto partner details	_____	_____
Name _____	_____	_____
Date of birth _____	_____	_____
Taxable income _____	_____	_____

Work Related Deductions

If an item of expenditure is directly related to your current employment, you were not reimbursed and you have a record to prove the expense, you may be able to claim it as a tax deduction. If the expense was both work-related and private, you can only claim a deduction for the work-related portion.

Other work-related expenses	
Telephone/mobile phone	\$
Work use portion of mobile	%
Internet	\$
Work use portion of internet	%
Home office use hours per week	
Stationery	\$
Courses and seminars	\$
Union fees	\$
Subscriptions	\$
Licence & association fees	\$
Tools of trade/equipment	\$
Repairs of equipment	\$
Computer equipment & software	\$
Sun protection	\$
Books & trade journals	\$
Purchase of assets over \$300*	\$
Date purchased	
Portion used for work	%
Donations	\$
Income protection insurance	\$
Personal super contributions	\$
Interest & dividend expenses	\$
Last year's accounting fee	\$
Other	\$

Work-related clothing & laundry expenses	
Work uniforms	\$
Protective clothing & safety gear	\$
Car expenses (log book method)	
Fuel	\$
Insurance	\$
Interest or leasing charges	\$
Registration	\$
Repairs and servicing costs	\$
Other	\$
Log book work use percentage	%
Car expenses (cents per kilometre method)	
Kilometres travelled*	
Work-related travel expenses	
Flights	\$
Travel costs e.g. uber fares	\$
Accommodation	\$
Meals	\$
Other	\$
Private portion of travel	%
Self-education expenses	
Course fees	\$
Kms travel between work & study	
Books	\$
Stationery	\$

*e.g. mobile, computer, tools

*excluding to and from work

Rental Property Information	
Address	
Number of weeks available for rent	
Date property first earned income	
Ownership	%
Rental Property Expenses	
Advertising	\$
Body corporate fees	\$
Borrowing expenses	\$
Cleaning	\$
Council rates	\$
Gardening/lawn mowing	\$
Insurance	\$
Interest	\$
Land tax	\$
Legal fees	\$
Pest control	\$
Property agent fees/commission	\$
Repairs & maintenance*	\$
Stationery, telephone & postage	\$
Water charges	\$
Other expenses	\$

Depreciable assets purchased over \$300	
Item	
Date	\$
Item	
Date	\$
Item	
Date	\$
Item	
Date	\$
Property improvements	
Item	
Date	\$
Item	
Date	\$
Item	
Date	\$
Item	
Date	\$
Item	
Date	\$

*(please include invoices)

Note

- Please provide us with a copy of your property depreciation report.
- If you haven't obtained a depreciation report please ask your accountant to determine if it's worthwhile for your property.

If you have more than one rental property please copy this page.

Useful records

- Income & expenses from business activities.
- Foreign source income (interest on overseas bank accounts, foreign pensions).
- Details of rental property income (agent statement).
- Investment purchase / sale statements (shares, property).
- Documentary evidence for all deductions & expenses (receipts, log books, itemised summaries).
- Written record of all hours worked from home



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TAX RETURNS



TAX TOOLS APP

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Francis A Jones
is a CPA practice

This handout contains information that is general in nature based on current taxation laws. You should not rely on this information without seeking your own independent advice.