

BBC – Fast Tax Data Checklist 2020

	Client Yes No	Office Use
New Clients		
Copies of last year's tax return including any schedules: depreciation, motor vehicle and rental schedules	<input type="checkbox"/> <input type="checkbox"/>	
If BBC only completes your return and not your partner's		
Spouses Taxable Income including a breakdown of any rental or investment losses, reportable fringe benefits and reportable employer superannuation contributions.	<input type="checkbox"/> <input type="checkbox"/>	
<i>The amount of child support your partner paid in the financial year (if any)</i>	\$ _____	
General Work Related and Other Tax Information		
Details of salary and wage income – PAYG and ETP Payment Summaries which may include Reportable Employer Superannuation Contributions. <i>Please note if your employer has lodged using STP we will already have this electronically.</i>	<input type="checkbox"/> <input type="checkbox"/>	
Details of foreign employment income – Payment Summary.	<input type="checkbox"/> <input type="checkbox"/>	
Employee share scheme information – a statement from your employer detailing any employee share scheme shares or options acquired.	<input type="checkbox"/> <input type="checkbox"/>	
Government Allowance such as JobSeeker, Youth Allowance and Austudy.	<input type="checkbox"/> <input type="checkbox"/>	
Details of <u>tax-free</u> government pensions, and/or foreign/other pensions	<input type="checkbox"/> <input type="checkbox"/>	
Interest received on bank accounts and term deposits held during the year	<input type="checkbox"/> <input type="checkbox"/>	
Details of any other income you have received e.g. income protection benefits, etc.	<input type="checkbox"/> <input type="checkbox"/>	
Work-related deductions. Examples Include:	<input type="checkbox"/> <input type="checkbox"/>	
<input type="checkbox"/> Motor vehicle log book and details of expenses		
<input type="checkbox"/> Work-related travel		
<input type="checkbox"/> Uniforms		
<input type="checkbox"/> Union dues		
<input type="checkbox"/> Telephone and internet		
<input type="checkbox"/> Stationery and reference materials		
<input type="checkbox"/> Computer expenses		
<input type="checkbox"/> Tools purchased (including cost of tools & description)		
<input type="checkbox"/> Income protection insurance premiums		
<input type="checkbox"/> Self-education expenses		
Home Office - _____ hours per week x _____ number of weeks	<input type="checkbox"/> <input type="checkbox"/>	
Donation Receipts	<input type="checkbox"/> <input type="checkbox"/>	
Private health fund – Do you have private health insurance hospital cover?	<input type="checkbox"/> <input type="checkbox"/>	
Total amount of child support you paid.	\$ _____	

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Other Information	Client Yes No	Office Use
Have you made a personal contribution to a Super Fund?	<input type="checkbox"/> <input type="checkbox"/>	
If yes, how much was your contribution?	\$ _____	
How much of this do you intend to use for the Super Co-contribution?	\$ _____	
How much of this do you intend to claim as a tax deduction?	\$ _____	
Please provide a copy of the written acknowledgement from your superannuation fund for the amount you wish to claim.	<input type="checkbox"/> <input type="checkbox"/>	
This <u>MUST</u> be provided before we can lodge your tax return.		
<i>If you are not sure, we recommend notifying your fund that you intend to claim all of the contribution as soon as possible. We can let you know if this should be varied when we complete your work. Please note however that if you roll to a new fund or commence a super pension that later amendments will not be possible.</i>		
Dependent Children full names, dates of birth, and if started/finished school.		

Are you registered with Centrelink to receive Family Tax Benefit?	<input type="checkbox"/> <input type="checkbox"/>	
Rental Investment Property		
Rental Summary from Real Estate Agent, AirBNB, or gross rental income.	<input type="checkbox"/> <input type="checkbox"/>	
Insurance Recovery Income & details	<input type="checkbox"/> <input type="checkbox"/>	
Loan Statements for the year or calculated amount of interest you paid	<input type="checkbox"/> <input type="checkbox"/>	
Loan package fees if paid from another account	<input type="checkbox"/> <input type="checkbox"/>	
Copies of invoices for any purchases of new fittings or furnishings	<input type="checkbox"/> <input type="checkbox"/>	
A breakdown of rental expenses for the year	<input type="checkbox"/> <input type="checkbox"/>	
<input type="checkbox"/> Rates and water charges		
<input type="checkbox"/> Body corporate fees		
<input type="checkbox"/> Insurance		
<input type="checkbox"/> Repairs and maintenance		
<input type="checkbox"/> Cleaning and gardening expenses		
<input type="checkbox"/> New equipment purchased		
<input type="checkbox"/> Travel (<i>now only required for non-residential/commercial rentals</i>)		
Provide Details of any periods not genuinely available for rent (<i>especially for holiday homes, houses being constructed or renovated, or for any other reason</i>)		

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Newly acquired rental property

- Purchase contract and settlement statement
- Purchase costs – solicitors fees, stamp duty, transfer costs, etc.
- Quantity Surveyor’s report
- Details of Borrowings (if jointly owned, details of ownership interest)

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Sale of rental property

- Sale contract and settlement statement
- Selling costs – solicitors fees, agents commission, advertising, etc
- Purchase contract and settlement statement if not previously supplied
- If the property was principal place of residence, dates the house was lived in.

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Investments – Shares and Managed Funds

- Investments – annual tax statements from Managed Funds.
(Please note these are usually not available until between August and September, so your tax return will not be able to be finalised until then if you have these types of investments.)
- Dividend statements (please also include the HIN/SRN)
(Also include this detail for dividends that have been reinvested)
- Loan statements and interest details
- New Shares Purchased – purchase documents showing purchase price and number of shares purchased
- Sale of Shares - sale documents showing number of shares sold and sale price, original purchase details including number of shares and purchase price
- Withdrawal/Sale of Managed Funds – sale documents and details of purchases if not previously supplied.

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