

X-Tax Checklist

Aged Care Workers



XOACCOUNTING

Income

- PAYG Summaries
- Pensions or government payments/allowances
- Interest earned for the relevant year from your banks, building societies etc.
- Dividend statements
- Details of rental property income
- Details of any business income
- Details of any other income earned

Aged Care Deductions

- Purchase and laundering costs of compulsory uniforms
- Protective items (overalls, goggles, gloves, non-slip shoes)
- Tools and equipment used for work (Eg Monitoring equipment, fob watches, work bags, laptop etc.)
- Repair/maintenance of work-related tools and equipment
- Job related CPD/self-education expenses
- Blue card, agency, association and union fees.
- Memberships, journals and subscriptions
- Overtime meal expenses
- Travel expenses (for home visits etc.)
- Personal car expenses (for transporting patients, equipment etc.)
- Mobile phone expenses

Work and other Expenses

- Personal car expenses (Est of km's if no logbook kept, otherwise logbook and all expense items.)
- Travel expenses (parking, tolls, flights, taxis, train and bus fares for training courses, trade fairs etc.)
- Accommodation costs while working away from home
- Phone costs (for work usage)
- Work percentage of computer/laptop expenses (Lease or purchase)
- Work percentage of internet costs
- Home office running expenses
- Work related self-education expenses
- Last year's tax return fee
- Income protection insurance premiums (paid outside of Superannuation)
- Investment expenses (Eg: bank fees, financial advisor's fees, investment borrowings etc.)
- Donations

Other Information

- Records of sales and purchases of any shares, business or property
- Private health insurance details
- Spouse details including D.O.B and estimated taxable income
- Children's details including D.O.B and evidence of any Centrelink benefits
- Details of any government debts (Child support, Centrelink ATO debt including previously written off debt)



XO Accounting
is a CPA Practice

PO Box 199 Werribee Vic 3030 Tel: 1800 106 141 Fax: 1300 083 691
Email: info@xoaccounting.com.au website: www.xoaccounting.com

Offices:

Melbourne :: Sydney :: Brisbane :: Adelaide :: Perth :: Richmond :: Werribee :: Melton ::
Geelong :: Auckland

