

X-Tax Checklist

Hospitality



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

Hospitality Deductions

- Compulsory uniforms (or items with venue logo)
- Protective clothing (aprons, hair nets, gloves, footwear etc.)
- Work specific clothing (eg. tunics, scarfs, chef's jacket and hats)
- Costs of equipment (chef's knives, cooking utensils, bar tools, processors, laptop etc)
- Leasing, repair and maintenance costs of work-related tools and equipment
- Interest on loans taken out to purchase work related equipment
- Job related self-education expenses such as RSA (course fees, equipment etc.)
- Hospitality books and subscriptions
- Cash and bar shortages
- Union fees
- Mobile phone if required for work purposes

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

