

## Pensioner Checklist

Tax File Number: ...../...../.....

ABN: .....

Are you an Australian resident? **YES/NO/UNSURE**

If an immigrant, when did you arrive in Australia?

\_\_\_\_\_

Name:

Mr/Mrs/Ms/Miss: \_\_\_\_\_

Name changed since last return? **YES/NO**

If **YES**, previous name: \_\_\_\_\_

Postal Address:

\_\_\_\_\_

\_\_\_\_\_

Date of Birth: ...../...../.....

Telephone: **(H)** \_\_\_\_\_ **(W)** \_\_\_\_\_ **(M)** \_\_\_\_\_

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

Occupation: \_\_\_\_\_

Spouse details (if applicable): \_\_\_\_\_

For Electronic Fund Transfer :

Please provide bank details: BSB: \_\_\_\_\_ Account number: \_\_\_\_\_

Account name: \_\_\_\_\_

- If you are a new client, please provide a copy of your previous tax return and financial statements for all individuals and entities.

Please circle **YES** or **NO** for each of the items listed below:

**INCOME – Please provide evidence**

- |  |               |
|--|---------------|
| 1. Australian Government allowances and payments like newstart, youth allowance and HELP (or Austudy) payment. | <b>YES/NO</b> |
| 2. Australian Government pension and allowances  | <b>YES/NO</b> |
| 3. Australian annuities and superannuation income streams  | <b>YES/NO</b> |
| 4. Australia superannuation lump sum payments  | <b>YES/NO</b> |
| 5. Interest (Please provide list)  | <b>YES/NO</b> |
| 6. Dividends (Please provide dividend notices)   | <b>YES/NO</b> |
| 7. Distributions from partnerships, trusts or managed funds  | <b>YES/NO</b> |
| 8. Net capital gains (Did you sell any investments?)   | <b>YES/NO</b> |
| 9. Foreign source income (including foreign pensions) and foreign assets or property                           | <b>YES/NO</b> |

**Other types of deductions**

- |  |               |
|--|---------------|
| <b>D7.</b> Interest deductions   | <b>YES/NO</b> |
| <b>D8.</b> Dividend deductions   | <b>YES/NO</b> |
| <b>D9.</b> Gifts or donations  | <b>YES/NO</b> |
| <b>D10.</b> Cost of managing tax affairs   | <b>YES/NO</b> |
| <b>D12.</b> Deductible amount of undeducted purchase price of a foreign pension or annuity | <b>YES/NO</b> |
| <b>L1.</b> Tax losses of earlier income years  | <b>YES/NO</b> |

**Tax offsets/rebates**

- |   |               |
|---|---------------|
| <b>T2.</b> Are you a senior Australian?                                     | <b>YES/NO</b> |
| <b>T3.</b> Are you a pensioner?   | <b>YES/NO</b> |
| <b>T4.</b> Did you receive a superannuation income stream?                  | <b>YES/NO</b> |
| <b>T5.</b> Did you have private health insurance during the financial year? | <b>YES/NO</b> |

**T9.** Did you have net medical expenses for disability aids,  
attendant care or aged care? **YES/NO**

(please provide receipts & total amount to claim)

**T10.** Did you maintain a parent, spouse's parent or invalid relative? **YES/NO**

**Other relevant information**

Are you entitled to the Medicare levy exemption or reduction in the financial year?

(If yes, please specify): **YES/NO**

\_\_\_\_\_

\_\_\_\_\_

Did you cease to be an Australian tax resident at any time during the financial year? **YES/NO**

Did you have a spouse at any time during the financial year? **YES/NO**

**Notes to Accountant:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Dated the ..... day of ..... 20....

\_\_\_\_\_  
Signature of taxpayer

\_\_\_\_\_  
Name (print)

**These checklists are a guide only. Your personal circumstances may be simpler or more complicated. Please provide any additional information relating to your situation.**