



CHECKLIST - INDIVIDUAL INCOME TAX RETURN
2019
NON-RESIDENT

2019 News:

Expats Main Residence Exemption - The LNP had planned to deny the CGT main residence exemption to home owners who sold their Australian home while living overseas. This would have applied retrospectively right back to the time it was purchased so there would not even be an exemption for the time you were living in Australia. The bill did not make it through parliament and has now lapsed. We are getting mixed messages as to whether it is likely to re appear. One politician said that it would never be resurrected yet another said it was still part of the government's plans. All we can say is please don't sell your Australian home without first checking with us.

PERSONAL DETAILS

Your Name: Mr | Mrs | Ms | Miss _____ DOB: ____ / ____ / ____
Was this the name used on your last tax return? YES [] NO []
Details if no: _____
Your Spouse's Name: Mr | Mrs | Ms | Miss _____ DOB: ____ / ____ / ____
Was this your spouse's name used on your last tax return? YES [] NO []
Details if no: _____
Spouses adjustable taxable income if we are not doing their tax return: \$ _____

Existing clients need only provide details of changes that have occurred since you lodged your last income tax return

Your Tax File Number: _____ Spouse's Tax File Number: _____
Residential Address: _____
Postal Address: _____
Has your postal address changed since lodging a tax return? YES [] NO []
Telephone: (W) _____ (H) _____ (M) _____
Are you a war veteran or widow/widower of a war veteran yet under the Aged Pension age? YES [] NO []
Is your spouse a war veteran or widow/widower of a war veteran yet under the Aged Pension age? YES [] NO []
If married / de facto in 2018/2019, what date did this occur: ____ / ____ / ____

Note, spouse includes same sex couples

TAX AGENT DETAILS

Attach a copy of your previous return if this is the first time using our services
Did an accountant prepare your last Income Tax Return? YES [] NO []
If yes please provide contact details of previous accountant: _____
Your Bank Account Details for Direct Deposit of Refunds BSB: _____ ACCT NO:: _____

The ATO is no-longer issuing cheques

Acct Name: _____

Do you have a will? **YES** **NO**

Do you have an Enduring Power of Attorney? **YES** **NO**

Do you feel comfortable that your financial affairs are under control? **YES** **NO**

BAN TACS Accountants now have a financial planning arm <https://bantacsfinancialsolutions.com.au/> providing the following:

- Income Protection Insurance Life Insurance Superannuation Financial Planning Strategies

INCOME

Did you receive Australian income other than from your rental property? **YES** **NO** If yes please provide details below

NAME OF ENTITY	AMOUNT
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Was any of the above income a Capital Gain? **YES** **NO** If yes please complete a CGT Schedule, available under Additional Forms where you obtained this form on the mail-ins page

EXPENSES

What were the total fees you paid to a tax agent during 2018/19? \$ _____

Did you have Australian expenses other than from your rental property? **YES** **NO** If yes please provide details below

DESCRIPTION OF EXPENSE	AMOUNT
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

ATTACHMENTS

Please enclose the following if they apply to you **Enclosed**

Statement for any tax deductible superannuation contributions you have made to an Australian Superannuation fund

Statement for any superannuation contributions you have made for your spouse to an Australian Superannuation fund

HECS or HELP loan statements

Receipts for PAYG Installments made on your investment income

Correspondence you have received from the ATO in the past 12 months

Rental Property Schedule

Please now complete a rental property schedule for each of your rental properties. This schedule is the same whether you are a resident or non resident for tax purposes and available here <https://www.bantacs.com.au/media-library/checklists/>

Or Use Our Mail In Service <https://www.bantacs.com.au/topics/mail-in-tax-returns/>

QUEENSLAND

[Mackay Office](#)

Suite 2, 44 Gordon Street, Mackay QLD 4740

Tel: 07 4951 1848 F: 07 4951 1840

[Ningi Office](#)

Ningi Plaza, 1224 Bribie Island Rd, Ningi, QLD 4511

Tel: 07 5497 6777, F:07 5497 6699

[Brisbane Office :](#)

433 Logan Road, Stones Corner, Brisbane Qld 4120

Tel: 1300 911 227

[Toowoomba Office](#)

19 Clifford Street Toowoomba, QLD 4350

Tel: 07 4638 2022, F: 07 4638 1440

[Gold Coast Office](#)

Suite 2b, Level 1,14 Carrara Street, Benowa , QLD 4217

Tel: 0435 437586

NEW SOUTH WALES

[Sydney Office](#)

Level 20, Tower 2, Darling Park, 201 Sussex Street, Sydney, NSW 2000

Tel: 1300 367 688, F: 02 9744 7882

[Burwood Office](#)

Suite D, 37A Burwood Road, Burwood , NSW 2134

Tel: 1300 367 688, F: 02 9744 7882

[Central Coast Office](#)

127 Diamond Head Drive, Budgewoi, NSW 2262

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VICTORIA

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231 Union Road, Ascot Vale Vic 3032

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