

INDIVIDUAL TAX RETURN CHECKLIST

INCOME

- Employment Income
- Centrelink/Pension Income
- Employment Termination Payment (ETP)
- Annuity & Superannuation Income Stream Statements/Lump Sum Payments
- Bonuses from Life Companies and Friendly Societies
- Interest Earned
- Dividends Statements
- Trust Distribution and Capital Gains Statements
- Foreign Source Income
- Business Income
- Employee Share Scheme Statements

TAX DEDUCTIONS

- Work Related Motor Vehicle Expenses (make and model required, log book may be required)
- Work Related Travel Expenses (eg. tolls, accommodation, meals)
- Work Related Clothing & Laundry Expenses
- Work Related Self-Education Expenses
- Dividend & Interest Deductions
- Tax Deductible Gifts & Donations
- Income Protection Insurance
- Union Fees
- Home Office Expenses (Log of hours if working from home)
- Seminars
- Overtime Meals (if an allowance was paid)
- Tools & Equipment
- Computer, Internet & Software Expenses
- Memberships & Subscriptions
- Telephone & Mobile Phone
- Sun Protection Receipts
- Superannuation Contributions – If Self Employed

OTHER USEFUL INFORMATION

- Child Support Agency Payments
- Private Health Insurance Statement
- Dependants – Name, DOB
- Zone – If living in a remote area (Dates)

INVESTMENT PROPERTY INFORMATION

- Annual Rental Agent Statement
- Rental Income
- Advertising for Tenants
- Bank Loan Statements (for Interest & Charges)
- Body Corporate Levies
- Cleaning
- Council & Water Rates
- Gardening & Lawn Mowing
- Insurance
- Land Tax
- Pest Control
- Property Management Fees/Commission
- Repairs & Maintenance
- Stationery, Telephone & Postage
- Replacements & Improvements

FOR NEW INVESTMENT PROPERTIES

- Date the Property was first available to rent
- Date the Property was built
- Depreciable Items (eg. Air Conditioning, Hot Water System, Stove)

CAPITAL ACQUISITIONS & DISPOSALS

- Copy of Contract and Settlement Statements for assets Purchased or sold (eg. Shares, Investment Properties)

NEW CLIENTS

- Last Year's Tax Return
- Previous year's Accounting Fees
- Bank account details (Bank account name, number & BSB)

HELP KEEP OUR DATABASE UP TO DATE

Full Name _____

Postal Address: _____

Street Address: _____

Email: _____

Home Phone: _____

Mobile: _____