



Business Initiatives

INDIVIDUAL TAX RETURN CHECKLIST

The following is a check list of items required to complete your individual tax return.

Please bring all applicable records to your meeting or forward to our office via email, post or fax.

NAME(S) _____

RESIDENTIAL ADDRESS _____

MAILING ADDRESS _____

Income

- PAYG Summaries (Group Certificates)
- ETP Statements (Employment Termination Payment)
- Overseas Pension
- Interest received
- Dividends received
- Partnership / Trust distribution records – taxation statement or tax return for private trusts
- Business Income / Earnings
- Rental Property:
 - o Agent / Client Summary of Income and Expenses (totals only)
 - o Bank Loan Statements / Interest Paid
 - o Details of property expenses including:
 - Council Rates, Taxes, Emergency Services Levy & Land Tax
 - Strata Fees
 - Phone
 - New items purchased > \$300 and date purchased
 - Insurance
 - Repairs & maintenance
- Capital Gains Tax
 - o Purchase and Sale documents for any of the following items sold:
 - Shares
 - Property
 - Art
 - Jewellery
- Annuity / Pension Income from a Superfund
- Foreign income receipts (dividends/investment)
- Other income received
 - o Details to be provided.

Deductions

- Motor vehicle deduction
 - Number of kilometers travelled for work
 - Original cost of car and date purchased
 - Details of all car expenses including fuel, registration, insurance, repairs / servicing, RAA
 - Log book
 - Hire Purchase / Chattel Mortgage Agreements
- Travel expenses - Interstate / Overseas
 - Receipts
- Travel Diary / Travel Allowance
 - If in receipt of a travel allowance; how many days spent away from home and where?
- Insurance for work related items
- Hire Purchase (Chattel Mortgage Agreements) for equipment
- Work related assets purchased or sold – dates and amounts
- Home office – estimate of number of hours worked per week
- Receipts for any item bought related to work
- Uniforms or protective clothing
- Self education expenses
- Personal Superannuation contributions (Notice of deductibility)
- Donations
- Interest and dividend related expenses
- Ceased full time education / changed residency status
- Work related telephone and internet expenses
- Printing, postage and stationery expenses
- Receipts for any publications relating to dividends

Other Information

- Did you work in a remote area or overseas?
- Last Home Loan Statement
- Medical expenses (relating to disability aids, attendant care and aged care expenses)
- Private Health Insurance annual statement
- Income Protection Insurance
- Bank account details for transfer of any refunds due
- Number of dependants