

YOUR INDIVIDUAL TAX RETURN CHECKLIST

Name:

TFN:

We have created the following checklist to help our clients prepare for their business tax returns. The checklist outlines the key documents and information that we require to quickly and efficiently prepare your tax return.

INCOME:

Did you receive any of the following income?	Y/N	If so, please provide the following:	✓
SALARY & WAGES	<input type="checkbox"/>	PAYG payment summaries	<input type="checkbox"/>
TERMINATION PAYMENTS	<input type="checkbox"/>	Statement of employment termination payment	<input type="checkbox"/>
CASH & CASUAL PAYMENTS	<input type="checkbox"/>	Diary records or payment advice notices	<input type="checkbox"/>
PRIVATE PENSIONS	<input type="checkbox"/>	PAYG payment summaries	<input type="checkbox"/>
PERSONAL SERVICES INCOME	<input type="checkbox"/>	Personal services attributed income payment summaries	<input type="checkbox"/>
INTEREST INCOME	<input type="checkbox"/>	End of year statement from banks/building societies	<input type="checkbox"/>
DIVIDEND INCOME	<input type="checkbox"/>	Share dividend statements	<input type="checkbox"/>
OTHER INVESTMENT INCOME	<input type="checkbox"/>	Annual tax statement	<input type="checkbox"/>
RENTAL INCOME	<input type="checkbox"/>	Rental Property Statements from the Real Estate	<input type="checkbox"/>
SALE OF SHARES	<input type="checkbox"/>	Purchase and sale contract notes	<input type="checkbox"/>
SALE OF PROPERTY	<input type="checkbox"/>	Solicitors correspondence for the purchase & sale	<input type="checkbox"/>

DEDUCTIONS:

Did you have any of the following deductions?	Y/N	
MOTOR VEHICLE EXPENSES	<input type="checkbox"/>	e.g. petrol, insurance, registration, services, repairs, interest, etc.
TRAVEL EXPENSES	<input type="checkbox"/>	e.g. public transport, parking, road tolls, car hire, airfares, taxis, meals, etc.
CLOTHING & UNIFORM EXPENSES	<input type="checkbox"/>	e.g. purchases, dry cleaning, home laundry, and repairs & alterations
SELF-EDUCATION EXPENSES	<input type="checkbox"/>	e.g. student union fees, course fees, textbooks, postage & stationery, parking, transport, internet charges, motor vehicle, computer, etc.
HOME OFFICE EXPENSES	<input type="checkbox"/>	e.g. gas & electricity, furniture, cleaning, etc.
OTHER WORK RELATED EXPENSES	<input type="checkbox"/>	e.g. union fees, seminars & conferences, books & journals, postage, stationery, sun protection, tools & materials, telephone, internet charges, etc.
EQUIPMENT PURCHASES	<input type="checkbox"/>	e.g. items over \$300 (advise date purchased, price & work usage %)
DONATIONS	<input type="checkbox"/>	if \$2.00 or more (advise of donation amount & nature of charity/fund)
TAX AGENT FEES	<input type="checkbox"/>	(advise of amount paid during the financial year for the previous returns)
PRIVATE HEALTH INSURANCE	<input type="checkbox"/>	(provide the Health Fund Statement)
MEDICAL EXPENSES	<input type="checkbox"/>	This offset is now restricted to net eligible expenses for disability aids, attendant care or aged care. The offset is 20% of the expenses over \$2,265
INCOME PROTECTION EXPENSES	<input type="checkbox"/>	(advise of the amount paid during the financial year)
RENTAL EXPENSES	<input type="checkbox"/>	(provide rental property statements and details of other expenditure incurred)

Do you have any further information that you would like to provide:

If we can assist you with any additional information, please do not hesitate to contact us directly. We would be happy to help.