

Individual Tax Return Checklist

When you come in to see us at tax-time, please bring in the following information to assist us in completing your tax return properly.

Income-earned statements

- Deductible amount from pensions/annuities
- Group Certificates/PAYG Summaries
- Capital Gains Tax statements
- Lump sum payments eg Eligible Termination Payment statements
- Social security, pensions, allowance documents/statements
- Trust distribution statements
- Managed Fund investments income statements
- Bank statements (interest received and fees charged)
- Share dividend statements
- Contract notes for buy/sell transactions
- Tax statements from Fund Managers/Stockbrokers
- Your latest superannuation statements, including rollover statements
- Income stream statements
- Life insurance Bonus Policy statements
- Foreign Source Income (including foreign pensions, investments and property)

Investment related deductions

- Interest/fees on borrowing for investment purposes (provide statement)
- Asset purchase agreements
- Asset sale document

Offsets

- Sole parents/spouse/housekeeper/low income/aged persons
- Spouse contributions to superannuation
- Superannuation pension rebates
- Private health insurance statement
- Medical receipts (if spent more than \$1,500)
- Imputation credit information from dividend statement

Investment property

- Water charges
- Bank fees
- Details of periods property was rented
- Date rental property was purchased
- Rental statements from Agent or rent received
- Capital costs
- Interest on loans
- Advertising
- Agent fees
- Body corporate
- Borrowing expenses
- Cleaning
- Council rates
- Gardening/lawn mowing
- Insurance
- Land tax
- General maintenance

Employment income deductions

- Schedule of work-related expenses from ATO
- Receipts for work-related deductions eg car/travel/clothes/laundry/meals/journal/periodicals/sun protection products/seminars and courses/mobile phone/subscription/union fees/tools and equipment

Other deductions

- Receipts for primary & secondary school expenses eg: computers/printers, internet connection, textbook, stationery, educational computer software. **Only applicable if you receive Family Tax Benefit A**
- Superannuation if self employed
- Receipts of gifts/donations to charities
- Receipts for self-education expenses eg books/computer costs/car expenses/union fees/course fees
- Financing lease statements
- Details of Income Protection Insurance premiums and ongoing financial planning advice

Other useful information

- Credit card statements
- Cheque butts
- Mortgage statement
- Previous year's accountant fees
- Last year's tax return
- Prior year tax losses
- Any tax credit vouchers
- HECS or Student Supplement loan debt

Would you like your Refund electronically paid directly into your Bank account? Please complete the following details:

- Account Name
- BSB Number.....
- Account Number.....

Postal Address changed from last tax return?

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Do we have your email address?

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