

# Individual Tax Return Checklist

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

## Income earned statements

- Payment Summaries/Group Certificates
- Lump Sum Payments eg Eligible Termination Payments
- Australian Government Payment Summaries
- Pensioner Income Stream Statements
- Bank Statements – showing interest and fees
- Share Dividend Statements
- Partnership Distribution
- Trust Distribution
- Tax Statements from Stockbrokers and Fund Managers
- Contract notes for buy / sell transactions of shares / funds
- Capital Gains (details of any assets sold and purchased)
- Foreign Sourced Income
- Rental Income

## Investment Property

- Advertising Fees
- Body Corporate Fees
- Borrowing Expenses
- Cleaning Fees
- Council Rates
- Depreciation Schedules
- Gardening / Lawn Mowing Fees
- Insurance Premiums Paid
- Interest on Loans
- Land Tax Details
- Legal Fees
- Pest Control
- Property Agent Fees
- Repairs and Maintenance
- Capital Costs
- Stationery and Telephone
- Travel
- Water Charges
- Any other related expenses

## Deductions

- Motor vehicle business km's (include log book)
- Motor vehicle expenses eg registration, insurance, repairs, tyres and fuel
- Travel expenses eg accommodation, flights etc)
- Uniforms / Protective Clothing
- Receipts of self education expenses eg books, computer costs, car expenses
- Schedule of work related expenses eg mobile, tools, subscriptions, licences, memberships etc
- Union Fees
- Receipts of gifts / donations to charity
- Income Protection Premiums (bring statements)
- Financing Lease Statements and Contracts
- Interest
- Fees on Investments
- Asset purchase / sale agreements

## Offsets

- Spouse – Adjusted Taxable Income
- Superannuation Pension Rebates
- Spouse contributions to superannuation
- Zone – if living in a remote area
- Private Health Insurance Statement
- Medical Receipts & Aged Care Expenses

## Other useful information

- Superannuation Statements
- Insurance Schedules
- Credit Card Statement
- Bank Statements (with account name and number, BSB number)
- Cheque Butts
- Loan Statements
- Updated Depreciation Schedule of Assets

## Dependants Details

- Details of Dependants
- Child Support paid/received

## New clients

- Last year's Income Tax Assessment
- Last year's Income Tax Return
- PAYG Instalments paid