

INDIVIDUAL TAX RETURN CHECKLIST



To assist us in completing your Income Tax Return, please complete the following checklist and return to us together with the relevant items.

FULL NAME:	
CURRENT ADDRESS:	
MOBILE:	
BUSINESS HOURS (WORK):	
AFTER HOURS (HOME):	
EMAIL :	
BANK ACCOUNT DETAILS:	
BSB:	
ACCOUNT NUMBER:	
JOB DESCRIPTION DETAILS:	

EMPLOYMENT INCOME:

- PAYG Payment Summaries
- Lump Sum and Termination Payment Summary
- Other Employment Related Income
- Directors Fees

INVESTMENT INCOME STATEMENTS:

- Bank Statements – showing interest received
- Dividend Statements
- Trust Distribution Statements
- Capital Gains Tax Statements
- Managed Funds Statements
- Foreign Source Income and details of any Foreign Tax Credits

OTHER INCOME:

- Government Pensions and Allowances
- Other Pensions and Allowances
- Details of any Capital Assets Sold

REBATES AND OFFSETS:

- Private Health Insurance – you must have your annual statement from your private health fund in order for us to complete your return.

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INVESTMENT PROPERTY:

- Property / Agent Rental Statements
- Advertising Fees
- Body Corporate Fees
- Rates & Taxes
- Insurance Premiums Paid
- Interest Paid
- Inspection Fees
- Repairs and Maintenance
- Land Tax Paid
- Improvements and Renovations Depreciation Schedules

DEDUCTIONS:

- Motor Vehicle Expenses – details of km travelled and/or details of expenses incurred
- Home Office Expenses
- Gifts or Donations
- Tax Agent Fees
- Self-Education Fees
- Subscriptions and Journals
- Work Related Clothing Expenses
- Tools of Trade
- Income Protection Insurance
- Travelling Expenses

SIGNATURE

DATE

NAME (Print)