

## Individual Tax Return Checklist

*Tick the box beside the items that apply to you*

**Client Name:** \_\_\_\_\_

**Income**

Foreign sourced income

Partnership distribution/s

Personal services income

Capital gains tax statements (details of assets sold)

Lump sum payments (e.g. eligible termination)

Superannuation pension payment summaries

Trust distribution statements

Tax statements from fund managers

Interest income

Share dividend statements

Tax statements from financial advisors

Payment summaries

Main occupation/title:

\_\_\_\_\_  
\_\_\_\_\_

**Investment Property continued...**

Date when property was purchased \_\_\_\_\_

Settlement statement/s

Purchase/sale contracts

**Employment Related Deductions**

Motor vehicle expenses:

a. Current log book percentage \_\_\_\_\_ and

b. Running costs for the year \_\_\_\_\_ or

c. Total work related km travelled \_\_\_\_\_

Work-related travel expenses

Work-related clothing/laundry

Work-related telephone calls

Subscriptions, union fees or professional memberships

Do you work from home? If so, please provide average number of hours per week \_\_\_\_\_

Books, journals or professional library expenses

**Investment Property**

Rental income

Land tax

Cleaning and general maintenance expenses

Water charges

Borrowing expenses

Capital costs

Interest on loans

Agent/advertising fees

Gardening/lawn mowing fees

Body corporate fees

Details of when property was rented, including any rental or Agent's statements

Council rates

Insurance premiums paid

Other:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Other Deductions**

Superannuation (if self-employed)

Gifts/donations to charity

Deductible amount for pension/annuities

Purchase or repair of equipment used for work

Self-education expenses (e.g. books, computer costs, car expenses)

Income protection premiums

Finance statements on deductible borrowings

## Individual Tax Return Checklist

### Investment related items

Interest/fees on borrowing for investments

Asset purchase/sale contracts and settlement statements

Buy/sell statements

### Offsets

Superannuation pension rebates

Private health insurance statement

Medical receipts (if spent more than \$2,333)\*

### For new clients

Last year's tax return

Last year's accounting fees

Children's names and DOB

### Bank account details (in case of refund)

Account Name:

BSB: \_\_\_\_\_ Account Number: \_\_\_\_\_

### Additional Notes:

\* Paid for medical expenses relating to disability aids, attendant care or aged care (for the year ending 30 June 2018):

- Table 1. Single – ATI Threshold \$90,000 or less – you can claim 20% of net medical expenses over \$2,333; \$90,000 or above – you can claim 10% of net medical expenses over \$5,504
- Table 2. Family – ATI Threshold \$180,000 or less (plus \$1,500 for each dependent child after the first) – you can claim 20% of net medical expenses over \$2,333; above \$180,000 (plus \$1,500 for each dependent child after the first) – you can claim 10% of net medical expenses over \$5,504