

Individual Tax Return Checklist

Tick the box beside the items that apply to you

Client Name: _____

Income	Investment Property continued...
Foreign sourced income	Insurance premiums paid
Partnership distribution/s	Date when property was purchased _____
Personal services income	Settlement statement/s
Capital gains tax statements (details of assets sold)	Purchase/sale contracts
Lump sum payments (e.g. eligible termination)	Employment Related Deductions
Superannuation pension payment summaries	Motor vehicle expenses:
Trust distribution statements	a. Current log book percentage _____ and
Tax statements from fund managers	b. Running costs for the year _____ or
Interest income	c. Total work-related km travelled _____
Share dividend statements	Work-related travel expenses
Tax statements from financial advisors	Work-related clothing/laundry
Payment summaries	Work-related telephone calls
Main occupation/title:	Subscriptions, union fees or professional memberships
	Do you work from home? If so, please provide average number of hours per week _____
Investment Property	Books, journals or professional library expenses
Rental income	Other:
Land tax	
Cleaning and general maintenance expenses	
Water charges	
Borrowing expenses	Other Deductions
Capital costs	Superannuation (if self-employed)
Interest on loans	Gifts/donations to charity
Agent/advertising fees	Deductible amount for pension/annuities
Gardening/lawn mowing fees	Purchase or repair of equipment used for work
Body corporate fees	Self-education expenses (e.g. books, computer costs, car expenses)
Details of when property was rented, including any rental or Agent's statements	Income protection premiums
Council rates	Finance statements on deductible borrowings

