

Individual Tax Return Checklist

Tick the box beside the items that apply to you

Client Name:

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

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

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: _____

Personal details (only fill out if your personal details have changed):

Phone Number:

Email:

Address:

Number of Dependent Children:

Additional Notes:
