



INDIVIDUAL TAX RETURN CHECKLIST

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For the year ending 30 June _____

Please complete and provide as much information as possible. Once you have the required information and completed checklist, either send the information to us or make an appointment to complete your tax return.

Full Name	<input type="text"/>
Address	<input type="text"/>
Date of Birth	<input type="text"/>
Tax File Number	<input type="text"/>
Mobile	<input type="text"/>
Email	<input type="text"/>
Bank Details for refund	<input type="text"/>
Occupation during the financial year	<input type="text"/>

INCOME

- PAYG Payment Summaries (e.g. Group Certificates from employers)
- Lump Sum payments (e.g. Employment Termination Payment)
- Partnership distribution statement, including copy of partnership's tax returns
- Trust Distribution statement, incl. copy of trust's tax return
- Documentation of foreign source income, foreign assets/ property
- Bank Statements with interest earned, incl. term deposits
- Dividend statements
- Employee share scheme statements
- Managed fund annual statement and capital gains statement
- Buy/Sell Contract notes for shares (if any shares were sold)

WORK RELATED DEDUCTIONS

- Work related travel, accommodation, meals etc
- Uniforms/ work- wear/ protective clothing
- Union Fees
- Professional development courses and seminars
- Professional memberships & subscriptions
- Professional journals/ trade magazines
- Self education expenses
- Work-related tools & equipment (e.g. Laptop)

Have you booked
your appointment yet?
Call Today on 3869 1885

Time: _____

Date: _____

- Home office Expenses (e.g. mobile, internet)
- Income Protection Insurance Premiums
- Any other cost incurred earning income

Did you use your vehicle for work?

Vehicle make/model Engine Size (e.g. 1.6 litres)

Total work kilometres travelled for the year:

The two methods available:

1. Cents per kilometre method

The claim is based on a set rate for each business kilometre travelled. Maximum claim is 5000 work related kilometers. Please provide details to show how you calculated your work related kilometers for the year

2. Log book method - Business % use

Ensure to keep a logbook for a continuous period of 12 weeks. Please provide details of all expenses you incurred over the financial year - registration, insurance, services & repairs, fuel & oil, and lease /loan/HP payments.

OTHER DEDUCTIONS

- Receipts for donations of \$2 and over made to charitable organisations or building funds (this excludes donations for which you received goods in exchange (e.g. art union, tickets etc)
- Tax preparation fee for last year tax returns

HELP/SFSS DEBT

Do you have an outstanding HELP/SFSS debt?

SPOUSE

Did you have a spouse during the year? Yes No

Your spouse's full name:

Your spouse's date of birth:

Number of days you were together during the year:

If we will not be preparing your spouse's return, please provide their taxable income:

CHILD SUPPORT

Did you pay child support? Yes No

Amount Paid:

Do you have any dependent children, if so how many?

PRIVATE HEALTH COVER

For the whole of the financial year did you and all of your dependents have private patient hospital cover? Yes No

If you had private health during the year, please attach your annual statement.