

## Individual Tax Return Checklist – Year End

Name of taxpayer: \_\_\_\_\_

Address: \_\_\_\_\_

Email: \_\_\_\_\_ Telephone: \_\_\_\_\_

Information	Information Provided	Not Applicable
<b>Income</b> PAYG payment summaries (group certificates) Lump sum payments & ETPs Partnership & trust distribution statements Foreign source income details Bank statements & term deposits stating interest earned Dividend statements Employee share scheme statements Managed fund annual tax statement including capital gains Capital gains (buy/sell contracts for shares & property sold)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<b>Work-related Deductions</b> Motor vehicle deductions (logbook or cents per kilometre) Details of home office expenses Professional memberships/subscriptions/union fees Receipts for courses, seminars & training Receipts for self-education expenses Receipts for other work-related deductions such as protective clothing, uniforms, tools and equipment	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<b>Other Deductions</b> Donations of \$2 and over to registered charities Expenditure incurred in managing tax affairs (tax agent's fees) Expenditure incurred in earning interest, dividend and other investment income (investment loans & fees) Income protection insurance premiums	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Information	Information Provided	Not Applicable
<b>Rental Properties</b> Period property was rented out during the income year Rental property statement (if managed by property agent) Rental income & expenditure (if not managed by property agent) Out of pocket expenses such as water, land tax and insurance Details of assets bought or disposed of during financial year Details of any capital improvements made on property Disposal of property during the financial year (buy/sell contracts & settlement statements)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<b>Offsets/Rebates</b> Details of any superannuation contributions for spouse Zone rebate (only claimable for zone residents) Details of dependants (date of birth and income) Private health insurance statement	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<b>Business Income (Sole Trader only)</b> Business income & expenditure details (cashbook, MYOB etc) Copies of PAYG summaries for employees Details of any government grants, rebates or payments received Details of superannuation contributions for employees Details of any business assets purchased during financial year Business bank & loan statements Notice of superannuation contributions for self-employed persons	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<b>Other Information</b> Bank account details Spouse income Child support documents Any other information that you think is relevant	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>