

INDIVIDUAL TAX RETURN CHECKLIST

1st July 2016 to 30th June 2017

PLEASE FILL IN THESE DETAILS BEFORE RETURNING THIS FORM

Name:

Address:

Home No:

Email Address:

Mobile No:

Occupation:

✓	INCOME	✓	DEDUCTIONS
	PAYG Summaries (formerly Group Certificates):		Motor Vehicle Claims:
	<ul style="list-style-type: none"> From ALL employers for current year. 		<ul style="list-style-type: none"> Details of the Motor Vehicle. List of Expenses.
	<ul style="list-style-type: none"> From Centrelink. From Pension funds. 		<ul style="list-style-type: none"> Details of trips showing kilometres travelled. Log book if prepared.
	<ul style="list-style-type: none"> Statement of Termination Payments. Employee Share Scheme Statements. 		Diaries/Receipts to show proof of the following expense claims:
	Investment Income:		<ul style="list-style-type: none"> Laundry. Home Office. Domestic Travel. Overseas Travel.
	<ul style="list-style-type: none"> Details of ALL current bank accounts and interest earned. Details of ALL accounts closed during the year and interest earned. Tax summary statements from all Managed Investment Funds. All dividend notices (most Companies pay 2 dividends per year). 		<ul style="list-style-type: none"> Self-education. Telephone, internet, union, sickness & accident etc.
	Rental Properties:		Receipts for all other work related deductions.
	<ul style="list-style-type: none"> All Agent summaries for year (where managed by an Agent). Details of all receipts for year (where personally managed). 		Receipts for all other income related deductions.
	<ul style="list-style-type: none"> Details of all expenses paid. 		Receipts for all Charitable Donations.
	<ul style="list-style-type: none"> Bank loan statements or interest paid. 		Details of Personal Super contributions (Self & Spouse). Provide letter of acknowledgment received from your superfund.
	Other Income:		OTHER INFORMATION
	<ul style="list-style-type: none"> Details of any other income including any earned overseas (foreign income). 		<ul style="list-style-type: none"> All Statements from private health fund showing rebate eligibility etc.
	Capital Gains:		<ul style="list-style-type: none"> Re net medical expenses tax offset, only payments made for disability aids, attendant care and aged care expenses over \$2,299.00 are eligible. Confirm any super co-contribution made and if so how much.
	(Purchase & Sale documentation will be required for disposal of the following):		<ul style="list-style-type: none"> Provide any child support amounts paid during the year.
	<ul style="list-style-type: none"> Shares, Real Estate and Unit Trusts. 		<ul style="list-style-type: none"> Names and dates of birth (Spouse/Children) and income details if any. Bank account details for tax refund.