

Checklist Individual Tax Returns

Please use the space provided after each section to note any queries you may have.

Copies of all

- PAYG Payment Summaries ☐
Unemployment/sickness benefit statements ☐
Centrelink/Parenting allowance statements ☐
Eligible termination payments (if any) ☐

Details of dependant children

- Names & birthdates of any additional dependant children
this financial year ☐

Interest earned

- Please bring your end of financial year statement from
your bank or building society. For passbook holders please
provide passbooks for the entire financial year. ☐

Investment income

- Please provide a share/investment dividend statement or a
trust/managed investment tax statement. ☐

Business relationships

- Please provide details of any partnerships/ trusts/trust
estates that you are involved with that we do not have
information on. ☐

Work related expenses

- Please provide details of all work related expenses
including uniforms, protective clothing, self-education,
union fees, income protection insurance, etc.

Please describe your occupation:

Do you work in a remote area, where:

Do you use of your motor vehicle for work: ☐

Describe how:

How many kilometres did travel for work:

How did you work this out:

Diary ☐ Estimated ☐ Log Book ☐ Other ☐

Please provide the Make/Model/Registration of the
vehicle:

If you did a logbook method please provide it along with
full details of operating expenses e.g. fuel, repairs,
registration and insurance, etc.

Medical Expenses ☐

If you have private health insurance please provide an end
of year statement from your fund.

If you had out of pocket medical expenses that exceed
\$2,000 (for Doctors, chemists, hospitals, physiotherapy,
etc) please supply a summary of:

- a) Service provider ☐
b) Fee charged ☐
c) Reimbursements received from Medicare or your
Private Health Insurance Fund. ☐

If you haven't kept all your receipts, it is possible to get an
annual summary from Medicare and your private health
insurance fund.

Superannuation

Please provide details of superannuation contributions that
you (not your employer) have made for yourself or on
behalf of your spouse. For each, please supply the
following:

- a) Fund name ☐
b) Policy number ☐
c) Amount ☐

Charitable donations ☐

Please provide receipts for any donations made to
charitable organisations (this excludes donations for which
you received goods in exchange and also excludes art
union tickets).

Rental properties

Please provide details of:

- a) The total gross rent received. If you use the services of a real estate agent please provide a copy of their statement/s. ☐
- b) The total for all your expenses e.g. rates, insurance, repairs & maintenance, etc. Please include invoices for any capital expenditure like, new hot water system, extension to house, kitchen renovation: ☐
- c) Details of kilometres travelled to collect rent or carry out inspections. ☐

If you purchased or sold your property in the last financial year, please provide all documents that relate to the purchase and sale of the investment property (this also applies to shares).

Special note: Depending on when your rental property was constructed you may need to obtain a Quantity Surveyor's report. We will, however, discuss this with you at the time of your interview.

Have you sold a rental property? ☐

Have you sold a rental property that was previously used as your main residence? ☐

Please provide information as to when it became a rental property and the market value of the property at the time it became a rental property.

New clients

If you are a new client, please provide a copy of the following:

- a) HECS statement ☐
- b) Last year's tax return & receipt for fee paid to your tax agent (if applicable) ☐

Did you pay accident or Income protection Insurance ☐

Please provide the invoice/statement.

Did you have any of the following work related expenses:

- Courses/seminars/workshops for work ☐
- Tools ☐
- Professional fees ☐
- Protective clothes (including sunscreen, sun glasses, hats etc) ☐
- Home office expenses ☐
- Mobile/Telephone expenses ☐

Please make a note of any questions, about the preparation of your tax return, which you might like to ask our tax team.

.....

.....

.....

.....

.....

.....

.....

If you have any other expenses you think may be deductible , please provide information;

.....

.....

.....

.....

.....

.....

.....

Note: Please bring this checklist and all relevant information with you when you come in for your interview. It helps us to complete your tax return more efficiently and accurately.