

Individual Tax Return Checklist

Income	<input checked="" type="checkbox"/>
Salary and wage income	<input type="checkbox"/>
Australian Government allowances and payments <ul style="list-style-type: none"> e.g. Newstart, Youth Allowance, etc. 	<input type="checkbox"/>
Australian Government pensions and other allowances <ul style="list-style-type: none"> e.g. Age pension, sole parent pension, income support pensions, etc. 	<input type="checkbox"/>
Other Australian annuities and superannuation income streams	<input type="checkbox"/>
Income from trusts and partnerships. <ul style="list-style-type: none"> Statements of distribution should be provided where appropriate 	<input type="checkbox"/>
Gross interest earned	<input type="checkbox"/>
Lump sum and termination payments <ul style="list-style-type: none"> All documentation should be provided including an ETP Payment Summary from the employer or fund 	<input type="checkbox"/>
Dividends and distributions <ul style="list-style-type: none"> Dividend statements, annual tax statements, etc. 	<input type="checkbox"/>
Net income or loss from business <ul style="list-style-type: none"> Include a summary of the years income and each category of business expenses e.g. telephone, materials and supplies, replacements, etc. 	<input type="checkbox"/>
Capital gains <ul style="list-style-type: none"> From real estate, shares, etc. Remember to include details of purchase costs and dates associated with acquisition and disposal 	<input type="checkbox"/>
Rent <ul style="list-style-type: none"> Agents annual rental summary statement Non-agent expenses - interest on loans, travel expenses, rates, etc. 	<input type="checkbox"/>
Foreign source (employment and pension) income <ul style="list-style-type: none"> Also details of any foreign tax credits, assets or property 	<input type="checkbox"/>
Other income <ul style="list-style-type: none"> Royalties, profit on sale of assets previously depreciated, etc. Details of any non-cash benefits received 	<input type="checkbox"/>
Spouse information - married or de facto Disclose all information relating to your spouse's tax return including: <ul style="list-style-type: none"> Taxable income Net investment losses Reportable superannuation contributions Fringe benefits 	<input type="checkbox"/>

See next page for deductions, rebates and additional information

Deductions	<input checked="" type="checkbox"/>
Work-related car expenses <ul style="list-style-type: none"> Estimate of work related kilometres travelled or logbook <u>and</u> summary of all running costs 	<input type="checkbox"/>
Work-related travel expenses	<input type="checkbox"/>
Work-related uniform, occupation specific or protective clothing, laundry/dry cleaning expenses	<input type="checkbox"/>
Work related self education expenses	<input type="checkbox"/>
Home office expenses where employment requires use of your computer, phone or other device	<input type="checkbox"/>
Gifts and donations of \$2 or over	<input type="checkbox"/>
Subscriptions (not including sporting or social clubs)	<input type="checkbox"/>
Investment and property expenses <ul style="list-style-type: none"> Carefully detail interest claims - these must be apportioned where at any stage non property withdrawals have been made 	<input type="checkbox"/>
Personal superannuation contributions <ul style="list-style-type: none"> Remember to include a notice of deductibility from your fund 	<input type="checkbox"/>
Income Protection Insurance Premiums	<input type="checkbox"/>
Tax Agent Fees and other accounting/tax audit fees	<input type="checkbox"/>
Special Deductions <ul style="list-style-type: none"> Australian films, investment shelters and agribusiness-type schemes 	<input type="checkbox"/>
Bank fees (on accounts that earn interest or are used for business purposes)	<input type="checkbox"/>
Unrecouped prior year losses	<input type="checkbox"/>
Rebates	<input checked="" type="checkbox"/>
Details of superannuation contributions where no tax deduction can be claimed	<input type="checkbox"/>
Any changes in dependents, children's details, DOB and any Centrelink benefits applicable (income of spouse should also be provided)	<input type="checkbox"/>
Details of any income received in a lump sum which was accrued in earlier income years (e.g. assessable pensions)	<input type="checkbox"/>
Details of any remote work performed for 183 days or more	<input type="checkbox"/>
Note - the net family medical expenses tax offset is being phased out from 2015/16 to 2018/19 and is restricted to net eligible expenses for disability aids, attendant care or aged care	<input type="checkbox"/>
Other information	<input checked="" type="checkbox"/>
Private health insurance statement	<input type="checkbox"/>
HECS/HELP Debt details	<input type="checkbox"/>
Bank account details if you are expecting a refund <ul style="list-style-type: none"> The ATO now only issues refunds via EFT 	<input type="checkbox"/>
A copy of your previous year's tax return if you are a new client	<input type="checkbox"/>

Please note that *all* claims must be substantiated, therefore we require you to bring in your substantiation or a summary of these claims if you would like them to be submitted as part of your return.