

Taxation Return Checklist

Title:	Mr	Mrs	Miss	Ms	Dr	Other:
First Name:	Family Name:					
	Phone Number:					
Email Address:						

Income Details

Have you attached your?	YES	N/A
Salary & wages - PAYG Summaries		
Allowances, Benefits, Earnings, Directors Fees, ETC		
Lump Sum and Termination Benefits - ETP Payment Summaries		
Centrelink or Veterans Affairs - Tax Statements		
Capital Gains - Details of any assets sold during the year		
Interest - Bank Statement, Term Deposits and high interest saver.		
Dividends - Dividend statements (2 per year)		
Income from Partnerships, Managed Trust Funds or Trusts.		
Income from Business		
Rental Property - Rental statement, loan statement, rates, water etc.		
Other Income - Jury Fees, Income Protection Payments Received.		

Deduction Details

Work related car expenses - Log Book. Kilometres travelled		
Work related travel - Domestic travel expenses - receipts required		
Uniform, Protective clothing - Receipts		
Self Education Expenses, Course Fees, Travel and Books		
Phone - Now need 1 month of itemised bills with business percentage		
Home Office , Internet - Now need a diary taken over 4 weeks		
Tools, Materials, Union fees, Stationery, Subscriptions, Computer etc		
Donations - Receipts		
Interest and Dividend Deductions		
Cost relating to managing your tax affairs if a new client		
Income Protection, Accident and sickness Insurance Premiums		

Income Tests

Spouse Income		
HECS or SFSS load details		
Private Health Insurance Details - Tax statement		
Reportable Fringe Benefits		
Child Support - paid or received		

If you have completed this checklist you can now call us to book an appointment.

Phone: 03 5338 7455