

Individual Tax Return Checklist

When you come to see us at tax-time, please bring the following items to assist in completing your tax return quickly.

Income Earned Statements

- PAYG Payment Summaries
- Allowances, Earnings, Tips, Directors Fees, Etc
- Employer Lump Sum Payments
- Employment Termination Payments
- Australian Government Allowances (Newstart, Youth Allowance, Austudy)
- Australian Government Pensions & other allowances
- Australian Annuities & Income Streams
- Australian Superannuation Lump Sum Payments
- Personal Services Income & Labour Hire
- Interest (Bank, Term Deposit, etc.)
- Dividends
- Employee Share Schemes
- Partnership & Trusts (Including Managed Funds)
- Capital Gains
- Foreign Source Income

Tax Offsets

- Pensioner/Seniors
- Australian Superannuation Income Stream
- Private Health Insurance
- Net Medical Out Of Pocket Expenses: Including Dental, Optometry, prescriptions, etc.
 Note: This offset will be phased out from the 2013/14 Financial Year

New Clients

- Tax File Number
- Copy of Last Years Tax Assessment

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- Spouse & Dependent Details
- Any Child Support Paid

Work Related Expenses

- Car Expenses
- Travel Expenses
- Gifts or Donations
- Income Protection Insurance
- Uniform Expenses Including Protective Clothing, Compulsory Uniform or Occupation Specific items
- Self Education Expenses Including Course Fees, Books, Stationery, Travel & Computer Consumables
- Other Work Related Expenses Including Union Fees, Telephone, Subscriptions, Tools, Equipment & Home Office Expenses
- Interest Deductions
- Dividend Deductions
- Taxation Expenses

Rental Properties

- Income Received
- Purchase Documents (if new purchase)
- Rental Agent Statements
- Interest on Loans
- Body Corporate Fees
- Cleaning, Repairs & Maintenance Costs
- Council Rates
- Water Rates
- Insurance Premiums Paid
- Land Tax
- Capital Costs
- Bank Fees & Charges

Bank Institution Details

- BSB & Account Number

Note: As of the 1st July 2013 the ATO are moving to EFT for Tax Refunds. Tax Refund Cheques will no longer be issued. Please ensure you provide us with your correct bank account details to avoid lengthy processing delays.