

Individual Tax Return Checklist

Personal Details

- ☐ Any changes in personal details?
- Name:
Address:
Telephone(s):
Mobile:
Email:
Marital status:
Occupation:

Income-earned statements

- ☐ PAYG Payment Summaries
- ☐ Social security, pensions, allowance summaries
- ☐ Lump sum payments
ie Eligible Termination Payment
- ☐ Interest Income received
- ☐ Dividend income received
- ☐ Rental income received
(provide solicitors statement if property purchased during the year)
Property Address.....
Rental Income Received
Agents Commission
Body Corporate levies
Council, Water & Land Tax paid
Insurance
Interest (incl. bank loan statements)
Repairs & Maintenance
Other Expenses
Other Expenses
Capital expenditure
- ☐ Partnership or Trust Distributions
- ☐ Managed Fund investment income statements
- ☐ Tax statements from Fund Managers/Stockbrokers
- ☐ Contract notes for buy/sell transactions
- ☐ Superannuation statements,
including rollover statements

Dependants

- ☐ Dependants Name(s) & D.O.B(s)
1. / .. / ..
2. / .. / ..
3. / .. / ..
4. / .. / ..

Deductions available

- ☐ Receipts of gifts/donations to charities
- ☐ Receipts of work related deductions
ie Car/travel/clothes/laundry/meals
- ☐ Receipts for self education expenses
ie HECS fees/books/computer costs/car expenses
- ☐ Interest/fees on borrowing for investment purposes
- ☐ Details of income protection premiums for additional deductions
- ☐ Deductible amount for pensions/annuities

Rebates available

- ☐ Sole parent/spouse/housekeeper/
low income aged persons
- ☐ Statements on spouse contributions
- ☐ Superannuation pension rebates
- ☐ Private health insurance statement
- ☐ Medical receipts (if spent more than \$1,500)

New clients

- ☐ Previous year's accountant fees
- ☐ Last year's tax return
- ☐ Prior year tax losses
- ☐ PAYG instalment notices

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