

Individual Tax Return Checklist

Tick the box beside the items that apply to you

Client Name: _____

Income

Foreign sourced income

Partnership distribution/s

Personal services income (PSI)

Capital gains tax statements (details of assets sold)

Employee Share Schemes (ESS)

Lump sum payments (e.g. eligible termination)

Superannuation pension payment summaries

Trust distribution statements

Tax statements from fund managers

Interest income

Share dividend statements

Tax statements from financial advisors

Income Statement from MyGov (Wages)

Government Allowances (e.g., Newstart)

Main occupation/title:

Investment Property continued...

Date when property was purchased _____

Settlement statement/s

Purchase/sale contracts

Private use portion (if applicable)

Body corporate fees

Council rates

Details of when property was rented, including any rental or Agents statements

Employment Related Deductions

Motor vehicle expenses:

a. Current log book percentage _____ and

b. Running costs for the year _____ or

c. Total work related km travelled _____

Work-related travel expenses

Work-related clothing/laundry

Work-related telephone calls

Work-related internet

Subscriptions, union fees or professional memberships

Other Income:

Do you work from home? If so, please provide average number of hours per week _____

Books, journals or professional library expenses

Investment Property

Rental income

Land tax

Cleaning and general maintenance expenses

Water charges

Borrowing expenses

Agent/advertising fees

Gardening/lawn mowing fees

Insurance premiums paid

Capital costs

Interest on loans

Other Income:

Other Deductions

Superannuation

Gifts/donations to charity

Deductible amount for pension/annuities

Purchase or repair of equipment used for work

Finance statements on deductible borrowings

Income protection premiums

Self-education expenses (e.g. books, computer costs, car expenses)

