

Individual Tax Return Checklist

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

Investment related deductions

- Interest/fees on borrowing for investment purposes (provide statement)
- Asset purchase agreements
- Asset sale documents

Employment income deductions

- Schedule of work-related expenses from ATO.
- Receipts or work-related deductions eg car/travel/clothes/laundry/meals

Offsets

- Sole parent/spouse/housekeeper/low income/aged persons
- Spouse contributions to superannuation
- Superannuation pension rebates
- Private health insurance statement
- Medical receipts (if spent more than \$1,500)
- Imputation credit information from dividend statement

Investment property

- Water charges
- Bank fees
- Details of periods property was rented
- Date rental property was purchased
- Rental statements from Agent or rent received
- Capital costs
- Interest on loans
- Advertising
- Agent fees
- Body corporate
- Borrowing expenses
- Cleaning
- Council rates
- Gardening/lawn mowing
- Insurance
- Land tax
- General maintenance

Income-earned statements

- Deductible amount for pensions/annuities
- Payment summaries
- Capital Gains Tax statements
- Lump sum payments eg Eligible Termination Payment statements
- Social security, pensions, allowance documents/statements
- Trust distribution statements
- Managed Fund investments income statements
- Bank statements (interest received and fees charged)
- Share dividend statements
- Contract notes for buy/sell transactions
- Tax statements from Fund Managers/Stockbrokers
- Your latest superannuation statements, including rollover statements
- Income stream statements
- Life insurance Bonus Policy statements

Other deductions

- Superannuation if self-employed
 - Receipts of gifts/donations to charities
 - Receipts for self-education expenses eg books/computer costs/car expenses
 - Financing lease statements
 - Details of income protection premiums
- Tax and ongoing financial planning advice

Other useful information

- Credit card statements
- Cheque butts
- Mortgage statement
- Previous year's accountant fees
- Last year's tax return
- Prior year tax losses
- Any tax credit vouchers

Bank account details if direct credit of refund required

- Account Name
- BSB Number
- Account Number