

INDIVIDUAL - TAX RETURN CHECKLIST

Please use this checklist as your tax time tool to ensure you have all the relevant and required information prepared to complete your individual income tax return.

GENERAL

- Bank account details: BSB, account number and account holder(s)
- HECS / HELP debt information
- Spouse details including all income
- Private health / medical cover - annual statement
- Superannuation deduction acknowledgment form

INCOME

- Payment Summaries
- Lump sum and eligible termination payment
- Government payment statements, if received
- Interest income from banks and building societies
- Dividend statements for dividends received or reinvested
- Annual tax statements from managed funds
- Commonwealth Superannuation Corporation pensions / transition pensions
- Partnership / trust distributions
- Other income:
 - Rental properties
 - Business
 - Foreign income or pensions
 - Capital gains - shares or rental properties
 - Employee share schemes

Other income usually requires more information - contact us here for the specific checklist for your situation.

DEDUCTIONS

- Work related expenses:
 - Motor vehicle (including all lease and finance payments)
 - Travel (fares and accommodation)
 - Uniforms / work-wear (safety boots, sun protection)
 - Self-education, licenses, certifications
 - Union fees, registrations, tools, subscriptions, memberships, first aid course
 - Home office (printing, postage, stationery books etc), conferences, seminars
 - Telephone, mobile, computer (% work related), internet
 - Any other costs incurred earning income
- Donations to charities, gifts, DGR or building funds
- Income protection insurance

APPOINTMENT

Date: _____ Time: _____

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