Individual Tax Return Checklist

Name of Taxpayer: ______________________

Address: ______________________

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Preferred Contact No: ______________________

Email: ______________________

TAXPRO

www.taxproaustralia.com.au

for more info, please call 9240 7629

Information Required	Information Provided	Not Applicable
Income		
PAYG summaries from employers, Centrelink and/or superannuation funds		
Lump sum payments (eg. Employment Termination Payment)		
Trust distribution statement, including copy of the trust's tax return		
Managed fund annual tax statement and capital gains statement		
Partnership distribution statement, including a copy of the partnership's tax return		
Dividend statements		
Bank statements stating interest earned		
Term deposit statements stating interest earned		
Buy/sell contract notes for shares (if any shares were sold)		
Work-Related Deductions		
Details of depreciable assets bought during the year (eg. laptops)		
Professional journals / magazines		
Professional memberships / subscriptions / union fees		
Receipts for continuing professional development courses and seminars		
Receipts for self-deduction expenses		
Receipts for other work-related deductions (eg. protective clothing, uniform expenses and travel)		
Receipts & percentage of mobile phone and internet use		
Receipts for home office expenses (please include proof of hours worked from home)		
Receipts for sun protection costs (eg. sunglasses and sunscreen)		
Receipts for printing, postage and stationary expenses		
Vehicle logbook for motor vehicle expenses (if using the logbook method)		
Other Deductions		
Receipts for donations of $2 and over to registered charities		
Expenditure incurred in managing tax affairs (eg. tax agent's fees)		
Expenditure incurred in earning investment income		
Income protection insurance premiums		
Rental Properties		
Annual statement from property agent (if engaging the services of an agent)		
Date when property was purchased		
Details of depreciable assets bought or disposed during the year		
Expenses incurred, which are not detailed on the property agent annual statement (eg. water charges, land tax and insurance premiums)		
If property is held by more than one individual, please provide details of owners and their legal ownership percentage		
If property was disposed of during the income year, information relating to dates and costs associated with the acquisition and disposal of the property		
Loan statements for property showing interest paid for the income year		
Period property was rented out during the income year		

Records detailing rental income (if not engaging the services of an agent) Records of expenses relating to the property (if not engaging the services of an agent) – *see rental worksheet* Depreciation report if your property is between 0 to 20 years (if needed, please contact us)		
Offsets / Rebates Details of any superannuation contributions for spouse Details of dependents, including their age, occupation and income Details of medical expenses where the total exceeds $2000 (after Medicare and private health fund rebates) Private health insurance statement (if insurance is held with your partner, please state who is the primary holder and provide the age of your partner) Expenses related to children's education (primary or secondary)		
If Operating as a Sole Trader... Copy of accounting file (eg. MYOB or Quickbooks) Copies of Business Activity Statements lodged Copies of PAYG summaries for employees Details of any government grants, rebates or payments received Details of superannuation contributions for employees Details of any assets purchased, including date of purchase and amount (eligible assets may qualify for the Small Business and General Business Tax Break) Finance contracts for all assets Notice of superannuation contributions for self-employed persons Payments of salaries and superannuation to associates Records from accounting software (eg. general ledger, trial balance, balance sheet and P&L) Statements of all liabilities of the business Summary of income and expenses – *see business worksheet*		
Additional Information Copies of Instalment Activity Statements lodged If you have any doubt about any income or expenses you have received or incurred, bring the documents in with you Any other information that you think is relevant		