

INDIVIDUAL TAX RETURN CHECKLIST

MUST HAVE DOCUMENTS

- Payment Summaries
- Share Dividend Statements
- Interest Received
- Motor Vehicle Expenses

- Travel Expenses for work related use
- Work related clothing eg. uniforms, laundry, Meals, dry cleaning, boots
- Self Education Expenses
- Other work related expenses, eg home office, Union
- Donations
- Tax Agent Fees
- Private Health Cover Statement
- Income Protection Premiums
- Last years Tax Return (new clients only)

INVESTMENT PROPERTY

- Agents Statement or record of Rent Received
- If purchased in that year, contract of purchase/ settlement statements
- Water Charges

- Interest Paid on loan for that property
- Council Rates
- Insurance
- Body Corporate Fees/Strata Levy
- Repairs & Maintenance
- Land Tax
- Capital Purchases/Improvements not R & M
- Quantity Surveyors Report for Depreciation

OTHER INCOME

- Foreign Source Income
- Partnership Distributions
- Rental Income
- Capital Gains/Losses (details of assets sold)

- ETP Lump Sum payments
- Tax Statements from Fund Managers

OTHER

- Super Contributions if self employed
- Personal Super contributions for co-Contribution.

OFFSETS

- Dependents details

Name	Taxable Income
D.O.B.	
- Zone Rebate
- Spouse Super Contributions for rebate

OTHER INVESTMENTS

- Buy/Sell Statements for share Investors
- Detail of Income & Expenses for Share Traders
- Income & Expense details for any business conducted as sole trader