

INDIVIDUAL INCOME TAX RETURN CHECKLIST _____

Please Indicate whether information is applicable (please tick); Y = Yes OR N = No AND Have you attached documentation? A = Attached - Leave blank if you are unsure.	Y or N	Required Documents	A
Salary or Wage Allowances, Earnings, Tips Director's fees, etc. Employer Lump Sum Payments	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	PAYG Payment Summary – Individual non business	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Employment Termination Payments (ETP's)	<input type="checkbox"/> <input type="checkbox"/>	PAYG Payment Summary – Employment termination payment	<input type="checkbox"/>
Australian Government Allowances and payments like Newstart, youth allowance and austudy payment	<input type="checkbox"/> <input type="checkbox"/>	Centrelink PAYG Payment Summary – Individual non business	<input type="checkbox"/>
Australian Government Pensions and other Allowances	<input type="checkbox"/> <input type="checkbox"/>	Centrelink PAYG Payment Summary – Individual non business	<input type="checkbox"/>
Other Australian Pensions or Annuities – including superannuation pensions	<input type="checkbox"/> <input type="checkbox"/>	PAYG Payment Summary – Superannuation income stream	<input type="checkbox"/>
Australian superannuation lump sum payments	<input type="checkbox"/> <input type="checkbox"/>	PAYG Payment Summary – Superannuation lump sum	<input type="checkbox"/>
Attributed Personal Services Income (e.g. Labour Hire)	<input type="checkbox"/> <input type="checkbox"/>	PAYG Payment Summary – Business and personal services income	<input type="checkbox"/>
Gross Interest	<input type="checkbox"/> <input type="checkbox"/>	Bank Statements	<input type="checkbox"/>
Dividends	<input type="checkbox"/> <input type="checkbox"/>	Dividend statement	<input type="checkbox"/>
Employee Share Schemes	<input type="checkbox"/> <input type="checkbox"/>	Documentation from company	<input type="checkbox"/>
Managed Investment Funds	<input type="checkbox"/> <input type="checkbox"/>	Fund Annual Tax Summary	<input type="checkbox"/>
Income from partnerships or trusts – Prepared by other accountants	<input type="checkbox"/> <input type="checkbox"/>	Copy of Tax return and financial statements	<input type="checkbox"/>
Capital gains – did you sell any shares or property?	<input type="checkbox"/> <input type="checkbox"/>	Refer To Capital Gains Checklist	<input type="checkbox"/>
Foreign Source Income, Assets or Property – (e.g. Foreign pensions)	<input type="checkbox"/> <input type="checkbox"/>	Summary of bank deposits or other documentation	<input type="checkbox"/>
Rent	<input type="checkbox"/> <input type="checkbox"/>	Refer to Rental Property Checklist	<input type="checkbox"/>
Bonuses from Life Companies and Friendly Societies	<input type="checkbox"/> <input type="checkbox"/>	Documentation from company	<input type="checkbox"/>
Forestry managed investment scheme income	<input type="checkbox"/> <input type="checkbox"/>	Documentation from company	<input type="checkbox"/>
Other Income (e.g. Royalties)	<input type="checkbox"/> <input type="checkbox"/>	Related Documentation	<input type="checkbox"/>
Work related car expenses	<input type="checkbox"/> <input type="checkbox"/>	Refer to Motor Vehicle Checklist	<input type="checkbox"/>
Work related travel expenses(tolls, parking, taxis, buses, airfares)	<input type="checkbox"/> <input type="checkbox"/>	Receipts or credit card statements	<input type="checkbox"/>
Work related uniform, occupation specific or protective clothing, laundry and dry cleaning expenses	<input type="checkbox"/> <input type="checkbox"/>	Receipts	<input type="checkbox"/>
Work related self-education expenses	<input type="checkbox"/> <input type="checkbox"/>	Receipts	<input type="checkbox"/>
Other work related expenses	<input type="checkbox"/> <input type="checkbox"/>	Receipts	<input type="checkbox"/>
Gifts or donations	<input type="checkbox"/> <input type="checkbox"/>	Receipts	<input type="checkbox"/>
Cost of managing tax affairs	<input type="checkbox"/> <input type="checkbox"/>	Receipts	<input type="checkbox"/>
Personal superannuation contributions – For Gov't Co-Contribution	<input type="checkbox"/> <input type="checkbox"/>	Notice to Superfund	<input type="checkbox"/>
Personal superannuation contributions – For Self Employment only	<input type="checkbox"/> <input type="checkbox"/>	Name of Fund	<input type="checkbox"/>
Do you have Private health insurance?	<input type="checkbox"/> <input type="checkbox"/>	Annual statement from health fund	<input type="checkbox"/>
Superannuation contributions on behalf of your spouse	<input type="checkbox"/> <input type="checkbox"/>	Documentation	<input type="checkbox"/>
20% Tax offset on net medical expenses over the threshold amount	<input type="checkbox"/> <input type="checkbox"/>	Annual summary from Health Fund, Medicare and Pharmacy	<input type="checkbox"/>
Child support you paid	<input type="checkbox"/> <input type="checkbox"/>	Amount Paid:	<input type="checkbox"/>