

CHECKLIST FOR INDIVIDUAL'S INCOME TAX RETURN

DOCUMENTS TO BE FORWARDED TO

TAXABILITY ACCOUNTING SERVICES PTY LTD

**Please attach photocopies of the following documents and tick the appropriate box.
A financial year runs from the 1st July to the 30th June**

<u>DESCRIPTION</u>	<u>ATTACHED</u>	<u>N/A</u>
➤ PAYG summaries from employment or pensions	<input type="checkbox"/>	<input type="checkbox"/>
➤ Details of any foreign employment income	<input type="checkbox"/>	<input type="checkbox"/>
➤ Eligible Termination Payment / (Redundancy) advice	<input type="checkbox"/>	<input type="checkbox"/>
➤ Interest on all bank accounts, including details of any interest earned and amounts deposited into first home savers accounts.	<input type="checkbox"/>	<input type="checkbox"/>
➤ Dividends received	<input type="checkbox"/>	<input type="checkbox"/>
➤ Statement from private health insurance company	<input type="checkbox"/>	<input type="checkbox"/>
➤ Business income and expenses	<input type="checkbox"/>	<input type="checkbox"/>
➤ Sale of any assets ie. shares, units, property or other investments	<input type="checkbox"/>	<input type="checkbox"/>
➤ Purchase of any assets ie. shares, units, property or other investments	<input type="checkbox"/>	<input type="checkbox"/>
➤ Rental property income and expenses	<input type="checkbox"/>	<input type="checkbox"/>
➤ Work related deductions	<input type="checkbox"/>	<input type="checkbox"/>
◆ Motor vehicle expenses		
◆ Self education		
◆ Travel expenses		
◆ Uniform / Protective clothing expenses		
◆ Home office expenses ie. electricity, contents insurance, telephone		
◆ Other expenses incurred ie. union fees, stationery, mobile phone		
➤ Superannuation contributions you have made (A copy of the letter from the superannuation fund acknowledging that a deduction will be claimed in your personal tax return is required)	<input type="checkbox"/>	<input type="checkbox"/>
➤ HECS / HELP Statements	<input type="checkbox"/>	<input type="checkbox"/>
➤ Donations: include receipts for donations over \$100	<input type="checkbox"/>	<input type="checkbox"/>
➤ Instalment Activity Statements	<input type="checkbox"/>	<input type="checkbox"/>
➤ Details of shares or options received through employee share schemes	<input type="checkbox"/>	<input type="checkbox"/>

There are also a number of rebates, which you can receive in the form of tax savings or as Centrelink payments. These claims are in relation to:

➤ Working and living in country areas	<input type="checkbox"/>	<input type="checkbox"/>
➤ Education expenditure incurred in respect of each child attending primary or secondary school. (eligible expenditure includes: textbooks, computers, stationery, internet, software etc.) Please provide a summary of the expenditure incurred for each child	<input type="checkbox"/>	<input type="checkbox"/>

➤ Dependant Details

Did you or your spouse have a baby or adopt a baby/child during the financial year?
If so please advise the following:

- a) Name of baby/child _____
b) Date of Birth of baby/child _____
c) Please advise the dates you or your spouse were legally responsible for the baby/child during the financial year. (In most circumstances this would be from date of birth (or adoption) until the 30 June).

➤ **Investment Property/Properties**

	<u>ATTACHED</u>	<u>N/A</u>
Details of periods property was rented (or available for rent)	<input type="checkbox"/>	<input type="checkbox"/>
Date rental property was purchased	<input type="checkbox"/>	<input type="checkbox"/>
Rental statements from Agent or rent received	<input type="checkbox"/>	<input type="checkbox"/>
Capital costs (ie. Improvements to the property)	<input type="checkbox"/>	<input type="checkbox"/>
Loan Statements from 1 July to the 30 June	<input type="checkbox"/>	<input type="checkbox"/>
Advertising	<input type="checkbox"/>	<input type="checkbox"/>
Agent fees	<input type="checkbox"/>	<input type="checkbox"/>
Bank fees	<input type="checkbox"/>	<input type="checkbox"/>
Body Corporate	<input type="checkbox"/>	<input type="checkbox"/>
Borrowing expenses (ie Loan fees)	<input type="checkbox"/>	<input type="checkbox"/>
Cleaning	<input type="checkbox"/>	<input type="checkbox"/>
Council rates	<input type="checkbox"/>	<input type="checkbox"/>
Depreciation Report	<input type="checkbox"/>	<input type="checkbox"/>
Gardening/lawn mowing	<input type="checkbox"/>	<input type="checkbox"/>
Insurance	<input type="checkbox"/>	<input type="checkbox"/>
Land tax	<input type="checkbox"/>	<input type="checkbox"/>
General maintenance	<input type="checkbox"/>	<input type="checkbox"/>
Water charges	<input type="checkbox"/>	<input type="checkbox"/>