

# 2017 Individual Tax Return Checklist

## PERSONAL DETAILS

|   |                |                            |  |
|---|----------------|----------------------------|--|
| Name:   |                | Occupation:                |  |
| Phone No:   |                | Mobile:                    |  |
| Your Tax File Number:   |                | Your Date of Birth:        |  |
| Email Address:  |                |                            |  |
| Home Address:   |                |                            |  |
| Postal Address:   |                |                            |  |
| Full Name of Spouse:  |                | Spouse Date of Birth       |  |
| Date of Marriage (if married during year):                                  |                | Spouse Taxable Income 2017 |  |
| <b>Your Bank Account Details (to receive any tax refund electronically)</b> |                |                            |  |
| BSB (Must be 6 digits)  | Account Number | Account Name               |  |

## INFORMATION

|   | Information Provided     | Not Applicable           |
|---|--------------------------|--------------------------|
| <b>Income</b>   |                          |                          |
| PAYG payment summaries (eg from employers)  | <input type="checkbox"/> | <input type="checkbox"/> |
| Lump sum payments (eg employment termination payment)   | <input type="checkbox"/> | <input type="checkbox"/> |
| Other salary income (includes any directors' fees, commissions, tips etc)   | <input type="checkbox"/> | <input type="checkbox"/> |
| Partnership distribution statement & copy of partnership's tax return   | <input type="checkbox"/> | <input type="checkbox"/> |
| Trust distribution statement & copy of trust's tax return   | <input type="checkbox"/> | <input type="checkbox"/> |
| Documentation regarding foreign source income, foreign assets or property   | <input type="checkbox"/> | <input type="checkbox"/> |
| Bank statements stating interest earned, including for term deposits  | <input type="checkbox"/> | <input type="checkbox"/> |
| Dividend statements   | <input type="checkbox"/> | <input type="checkbox"/> |
| Employee share scheme statements  | <input type="checkbox"/> | <input type="checkbox"/> |
| Managed fund annual tax statement and capital gains tax statement   | <input type="checkbox"/> | <input type="checkbox"/> |
| Buy/sell contract notes for shares (if any shares were sold)  | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Work-related Deductions</b>  |                          |                          |
| Details of depreciable assets bought during the year (eg laptops)   | <input type="checkbox"/> | <input type="checkbox"/> |
| Details and receipts for home office expenses   | <input type="checkbox"/> | <input type="checkbox"/> |
| Professional journals/trade magazines   | <input type="checkbox"/> | <input type="checkbox"/> |
| Professional memberships/subscriptions  | <input type="checkbox"/> | <input type="checkbox"/> |
| Receipts for continuing professional development courses and seminars   | <input type="checkbox"/> | <input type="checkbox"/> |
| Receipts for self-education expenses  | <input type="checkbox"/> | <input type="checkbox"/> |
| Receipts for other work-related deductions eg protective clothing, uniform expenses, tools and equipment and travel | <input type="checkbox"/> | <input type="checkbox"/> |
| Vehicle logbook for motor vehicle expenses (if using the logbook method)  | <input type="checkbox"/> | <input type="checkbox"/> |

|   | <b>Information Provided</b> | <b>Not Applicable</b>    |
|---|-----------------------------|--------------------------|
| <b>Other Deductions</b>   |                             |                          |
| <i>Receipts for donations of \$2 and over to registered charities</i>   | <input type="checkbox"/>    | <input type="checkbox"/> |
| <i>Expenditure incurred in managing tax affairs (eg tax agent fees)</i>   | <input type="checkbox"/>    | <input type="checkbox"/> |
| <i>Expenditure incurred in earning interest, dividend and other investment income</i>   | <input type="checkbox"/>    | <input type="checkbox"/> |
| <i>Income protection insurance premiums</i>   | <input type="checkbox"/>    | <input type="checkbox"/> |
|   |                             |                          |
| <b>Rental Properties</b>  |                             |                          |
| <i>Date when property was purchased, including details of co-ownership if applicable</i>  | <input type="checkbox"/>    | <input type="checkbox"/> |
| <i>Period property was rented out during the income year</i>  | <input type="checkbox"/>    | <input type="checkbox"/> |
| <i>Records detailing rental income (annual statement from property agent)</i>   | <input type="checkbox"/>    | <input type="checkbox"/> |
| <i>Loan statements for property showing interest paid for the income year</i>   | <input type="checkbox"/>    | <input type="checkbox"/> |
| <i>Expenses incurred such as water charges, land tax and insurance premiums</i>   | <input type="checkbox"/>    | <input type="checkbox"/> |
| <i>Details of depreciable assets bought or disposed of during the year</i>  | <input type="checkbox"/>    | <input type="checkbox"/> |
| <i>If the property was disposed of during the income year, information relating to dates and costs associated with the disposal of the property</i>                                 | <input type="checkbox"/>    | <input type="checkbox"/> |
|   |                             |                          |
| <b>Offsets/Rebates</b>  |                             |                          |
| <i>Details of any superannuation contributions for spouse</i>   | <input type="checkbox"/>    | <input type="checkbox"/> |
| <i>Details of medical expenses where the total exceeds \$2,265 (after Medicare &amp; Private Health Fund rebates) relating to disability aids, attendant care or aged care only</i> | <input type="checkbox"/>    | <input type="checkbox"/> |
| <i>Details of dependants, including their age, occupation and income</i>  | <input type="checkbox"/>    | <input type="checkbox"/> |
| <i>Private health insurance statement (and details of prepaid premiums)</i>   | <input type="checkbox"/>    | <input type="checkbox"/> |
|   |                             |                          |
| <b>If Operating As a Sole Trader</b>  |                             |                          |
| <i>Cashbook, which includes records of drawings taken before the business takings were banked</i>   | <input type="checkbox"/>    | <input type="checkbox"/> |
| <i>Copies of Business Activity Statements lodged</i>  | <input type="checkbox"/>    | <input type="checkbox"/> |
| <i>Copies of PAYG summaries for employees</i>   | <input type="checkbox"/>    | <input type="checkbox"/> |
| <i>Details of any Government grants, rebates or payments received</i>   | <input type="checkbox"/>    | <input type="checkbox"/> |
| <i>Details of superannuation contributions for employees</i>  | <input type="checkbox"/>    | <input type="checkbox"/> |
| <i>Details of any assets purchased, including date of purchase and amount</i>   | <input type="checkbox"/>    | <input type="checkbox"/> |
| <i>Payments of salaries and superannuation to associates</i>  | <input type="checkbox"/>    | <input type="checkbox"/> |
| <i>Records from accounting software (eg trial balance, profit &amp; loss and balance sheet</i>  | <input type="checkbox"/>    | <input type="checkbox"/> |
| <i>Statements of all liabilities of the business</i>  | <input type="checkbox"/>    | <input type="checkbox"/> |
| <i>Notice of superannuation contributions for self-employed persons</i>   | <input type="checkbox"/>    | <input type="checkbox"/> |
|   |                             |                          |
| <b>Other Information</b>  |                             |                          |
| <i>Copies of Instalment Activity Statements lodged</i>  | <input type="checkbox"/>    | <input type="checkbox"/> |
| <i>Any other information that you think is relevant</i>   | <input type="checkbox"/>    | <input type="checkbox"/> |