

Tax Time Checklist

PRIOR TO COMMENCING YOUR PERSONAL INCOME TAX RETURN, PLEASE ENSURE YOU HAVE THE FOLLOWING INFORMATION TO BRING ALONG TO YOUR APPOINTMENT:

Income:-

Item	Evidence	Does this apply?
Salary & wages	PAYG Payment Summary (<i>employer provides</i>)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Employment termination	ETP Payment Summary	Yes <input type="checkbox"/> No <input type="checkbox"/>
Centrelink assistance	PAYG Payment Summary (<i>Centrelink provides</i>)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Interest earned	Bank statements (<i>check your 30th June statement for summary</i>)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Dividends received	Dividend notices from company or Shareholder Reference Number (SRN) for holding	Yes <input type="checkbox"/> No <input type="checkbox"/>
Partnership and / or Trust distribution income	Partnership / Trust income tax return	Yes <input type="checkbox"/> No <input type="checkbox"/>
Managed investment income	Annual tax statement (<i>fund provides</i>)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Foreign income	Bank statements and notices of income from provider	Yes <input type="checkbox"/> No <input type="checkbox"/>
Capital gains	Copies of purchase and sale contracts for any investments sold between 1 st July 2010 & 30 th June 2011	Yes <input type="checkbox"/> No <input type="checkbox"/>

Expenses:

Item	Evidence	Does this apply?
Vehicle expenses (<i>do you use your car for work?</i>)	Log book or diary evidence showing travel undertaken (included distance per trip)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Travel expenses (<i>head to a seminar this year?</i>)	Parking fee, bus or train ticket receipts	Yes <input type="checkbox"/> No <input type="checkbox"/>
Uniform expenses (<i>replacement or maintenance</i>)	Receipts	Yes <input type="checkbox"/> No <input type="checkbox"/>
Self-education expenses (<i>improving the knowledge you use at your current employment, or do you receive Youth Allowance or Austudy?</i>)	Receipts for items such as school books, stationery, union fees and course fees	Yes <input type="checkbox"/> No <input type="checkbox"/>
Other work related expenses	Receipts / invoices for items such as phone costs, tools or equipment, unions fees, journal subscriptions, stationary costs etc If you have an office at home that you utilise for work purposes, please provide details of how many hours you utilise that office.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Income protection insurance	Renewal notice	Yes <input type="checkbox"/> No <input type="checkbox"/>
Donations	Receipts	Yes <input type="checkbox"/> No <input type="checkbox"/>
Investment expenses	Receipts	Yes <input type="checkbox"/> No <input type="checkbox"/>

Tax Offsets:-

Item	Evidence	Does this apply?
Private health insurance	Annual tax statement (<i>health fund provides</i>)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Medical expenses over \$2,000 (<i>net of Medicare & health insurance refunds</i>)	Receipts / invoices for items such as doctors, optometrists, dentists, prescribed pharmaceuticals etc	Yes <input type="checkbox"/> No <input type="checkbox"/>
Education tax refund	Please refer to the separate flyer regarding this offset	Yes <input type="checkbox"/> No <input type="checkbox"/>

Rental Property:-

Item	Evidence	Does this apply?
Rental income	Rental agent statements or income listing	N/A
Expenses	Rental statements / invoices for items such as <ul style="list-style-type: none"> - Council rates - Water rates - Insurance - Repairs & maintenance - Body corporate fees - Lease preparation and tenant advertising costs 	Yes <input type="checkbox"/> No <input type="checkbox"/>
Loan interest deduction	Loan statements	Yes <input type="checkbox"/> No <input type="checkbox"/>
Capital gain (loss) (<i>did you sell your rental property this year?</i>)	Settlement statements from your solicitors regarding both the purchase and sale of the property. Details of building costs incurred if applicable	Yes <input type="checkbox"/> No <input type="checkbox"/>

***We would love to help you out with
your tax return this year!***

**Call us on *(03) 5330 2113* to arrange an appointment
8 Whitehorse Road, Mt Clear**

***PRESSED FOR TIME OR UNABLE TO COME IN FOR AN
APPOINTMENT?***

**NO WORRIES - JUST DROP OFF, FAX OR EMAIL YOUR DOCUMENTATION
TO US AND WE'LL TAKE CARE OF EVERYTHING FOR YOU.**