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## Individual Tax Return Checklist 2015 YEAR

### Income

- PAYG Payment Summaries**.....
- Lump Sum and Termination Benefits** (including ETP payment summaries).....
- Centrelink or Veteran Affairs Assistance** (payment summary).....
- Superannuation Income Stream/Lump Sum Payments** (payment summary).....
- Details of assets sold during the year e.g. shares, property** - Include purchase and sale contracts. For properties, we will also need agent's commission, legal fees, and stamp duty paid.....
- Investment Statements** Include dividend statements, interest earned, trust investment annual tax statements, partnership distributions.....
- Rental Property Income** include address of property, purchase date, date first rented and weeks the property was rented during the year.....
- Foreign Source Income** including details of any foreign tax paid.....
- Business Income** (please refer to work related expenditure for any deductions you may be entitled to).....
- Employee Share Schemes** (include all paperwork received from your employer).....

### Deductions

#### Work Related Expenditure

- Motor Vehicle** - If you use your vehicle for work purposes, you will need to bring the following information: your logbook, itemised expenses such as registration, greenslip, comprehensive insurance, maintenance, fuel, tolls, lease payments, tyres etc.....
- Travel** - this includes airfare and train travel required for work (not to and from work).....
- Tools and Equipment Purchased for Work** - includes computer equipment and work tools (please bring all receipts).....
- Stationery** - includes diaries, calculators, printing paper and ink etc.....
- Reference Books and Materials**.....
- Home Office Expenses** - if you work from home you may be able to claim a portion of utilities expenses including electricity, home phone, mobile phone, and internet.....
- Self Education** - includes course fees, textbooks etc (please bring all receipts).....
- Uniform/Protective Clothing** - includes work boots and overalls.....
- Subscriptions** – Publications that relate to your work.....
- Union Fees**.....

**Investment Deductions** - for Shares and Managed Funds

- Subscriptions to share magazines or newspapers.....
- Interest Paid and Bank Fees on Investment Loans.....
- Computer expenses - includes internet fees, printing paper and ink.....

**Investment Property Expenses** - If you have an investment property, to maximise your deductions you'll need:

- Depreciation Schedule.....
- Interest Paid and Bank Fees on Investment Loan.....
- Agent/Landlord Monthly and Annual Rental Statements - .....
- Other Rental Property Expenses - includes, strata levies, council and water rates, insurance, pest control, land tax, cleaning, travel, and advertising expenses.....
- Repairs/Renovations - If you have made any repairs to the property, we would like to review your receipts for amounts paid. This assists us to confirm whether items are 100% deductible or if they are required to be depreciated.....

**Other Deductions**

- Donations - to registered charitable, educational or cultural organisations.....
- Tax Agent Fees - we will have record of payments from all our current clients.....
- Income Protection Insurance - please bring your annual tax statement.....

**Additional Information**

- Private Health Insurance Tax Statement for each individual .....
- Number of Dependants.....
- Personal Superannuation Contributions.....
- Net Medical Expenses (for you, your spouse or your family) - **If claimed in 2014 or where a taxpayer had expenses for disability aids, attendant care or aged care** if they **exceed \$2,218** out of pocket, or in some instances if they **exceed \$5,233** out of pocket (depending on your income level) in total after Medicare and Private Fund rebates (includes dental, pharmacy, orthodontics, etc) (excludes cosmetic surgery)
- HELP/SFSS Accumulated Debt as at 30 June 2015.....
- Tax Losses/Capital Losses brought forward from 2014 year .....
- Child Support Total amount paid from 1 July 2014 to 30 June 2015 (this includes maintenance payments, and other payments for children such as school fees, excursions, uniforms, etc)
- Bank Details Your bank details will be required for any refunds being issued. Be sure to bring your Account details to your appointment including, Institution name, BSB, account number, name on account. A current bank statement will have all the information required.
- Spouse Details A copy of the income tax return prepared for your spouse will be required where it is not prepared by our office

**\* Please note that any unsorted receipts will prevent us completing your tax return on the day of your appointment. Any additional work will be charged on a time basis.**