

# 2017 Individual Tax Return Checklist

Name of taxpayer: \_\_\_\_\_

Address: \_\_\_\_\_

Preferred contact no.: \_\_\_\_\_

| 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"/> |
| Partnership distribution statement, including copy of partnership's tax return  | <input type="checkbox"/> | <input type="checkbox"/> |
| Trust distribution statement, including copy of trust's tax return  | <input type="checkbox"/> | <input type="checkbox"/> |
| Documentation re 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 such as 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>Other deductions</b>   |                          |                          |
| Receipts for donations of \$2 and over to registered charities  | <input type="checkbox"/> | <input type="checkbox"/> |
| Expenditure incurred in managing tax affairs (eg tax agent's fees)  | <input type="checkbox"/> | <input type="checkbox"/> |
| Expenditure incurred in earning interest, dividend and other investment income (eg investment advice fees)                | <input type="checkbox"/> | <input type="checkbox"/> |
| Income protection insurance premiums  | <input type="checkbox"/> | <input type="checkbox"/> |

| Information  | Information provided  | Not applicable  |
|--|---|---|
| <p><b>Rental properties</b></p> <p>Date when property was purchased, including details of co-ownership if applicable</p> <p>Period property was rented out during the income year</p> <p>Records detailing rental income (annual statement from property agent, if engaging services of an agent)</p> <p>Loan statements for property showing interest paid for the income year</p> <p>Expenses incurred such as water charges, land tax and insurance premiums</p> <p>Details of depreciable assets bought or disposed of during the year</p> <p>Details of any capital works on the property</p> <p>If the property was disposed of during the income year, information relating to dates and costs associated with the disposal of the property</p>     | <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>   | <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>   |
| <p><b>Offsets/rebates</b></p> <p>Details of any superannuation contributions for spouse</p> <p>Details of dependants, including their age, occupation and income</p> <p>Private health insurance statement (and details of prepaid premiums)</p>   | <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>   | <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>   |
| <p><b>If operating as a sole trader</b></p> <p>Cashbook, which includes records of drawings taken before the business takings were banked</p> <p>Copies of Business Activity Statements lodged</p> <p>Copies of PAYG summaries for employees</p> <p>Details of any government grants, rebates or payments received</p> <p>Details of superannuation contributions for employees</p> <p>Details of any assets purchased, including date of purchase and amount</p> <p>Payments of salaries and superannuation to associates</p> <p>Records from accounting software (eg trial balance, profit and loss, and balance sheet)</p> <p>Statements of all liabilities of the business</p> <p>Notice of superannuation contributions for self-employed persons</p> | <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> | <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> |
| <p><b>Other information</b></p> <p>Copies of Instalment Activity Statements lodged</p> <p>Any other information that you think is relevant</p>   | <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>   | <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>   |