**Individual Tax Return Checklist**

Name of taxpayer/s: ____________________________________________________________

Contact No: ____________________   Email: _______________________________________

Year/s: ______________________

<table>
<thead>
<tr>
<th>Information</th>
<th>Information Provided</th>
<th>Not Applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Income</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAYG Summaries (Group Certificate) from employers, Centrelink and/or</td>
<td></td>
<td></td>
</tr>
<tr>
<td>superannuation funds. Lump sum payments (eg Employment Termination</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payment)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Allowances, earnings, tips, directors fee’s, Jury duty</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bank statements detailing interest earned</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dividend statements</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managed fund annual tax statement and capital gains tax statement</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Partnership distribution statement, including a copy of the partnership’s</td>
<td></td>
<td></td>
</tr>
<tr>
<td>tax return</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trust distribution statement, including a copy of a trust’s tax return</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Buy/Sell contract notes for investments (Capital Gains)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foreign income</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Details of spouse taxable income</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<p>| Other Deductions                                                           |                      |                 |
| Work related motor vehicle use (detail of work related km’s travelled during |                      |                 |
| the year or expenses incurred if using log book method and a copy of the    |                      |                 |
| log book that is less than 5 years old)                                     |                      |                 |
| Summary/totals of work related deductions such as protective clothing,      |                      |                 |
| uniform expenses, stationery, travel &amp; tools                               |                      |                 |
| Summary/totals for self-education expenses, continuing &amp; professional      |                      |                 |
| development courses and seminars, textbooks, journals.                     |                      |                 |
| Professional journals, magazines, memberships &amp; subscriptions              |                      |                 |
| Details of depreciable assets bought during the year (eg laptops)           |                      |                 |</p>
<table>
<thead>
<tr>
<th><strong>Home Office Expenses (eg Paper, Ink, Stationery, Internet)</strong></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Receipts for donations of $2 and over to registered charities</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Expenditure incurred in managing tax affairs (eg tax agent fees)</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Expenditure incurred in earning investment income</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Income protection insurance premiums</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Rental Properties</strong></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual statement from property agent (if engaging the services of an agent)</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Records details rental income (if not engaging the services of an agent)</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Bank Fees</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Repairs, Maintenance and Improvements</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Interest on loans</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Advertising fees</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Body corporate fees</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Borrowing expenses</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Cleaning and general maintenance expenses</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Council Rates/Water Rates</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Gardening/lawn mowing fees</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Insurance premiums paid</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Land tax details</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Sale</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Purchase Documents</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Details of depreciable assets bought or disposed during the year and/or a copy of the quality surveyors report</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Period the property was available for rent during the income year</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Offsets/Rebates</strong></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Details of any superannuation contributions for spouse</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Details of medical expenses where the total exceeds $2,060 (after Medicare and private health insurance)</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Private health insurance annual statement</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>