

INDIVIDUAL TAX RETURN CHECKLIST 2016



NAME: _____

When you come in to see us at tax time, please bring the following items to assist us in completing your tax return.

Investment related deductions

- Interest / fees on borrowing for investment purposes (bring statements)
- Asset purchase/sale agreements

Employment income deductions

- List of work related expenses i.e. tools, income protection insurance
- Receipts or evidence of work related deductions e.g. car, travel, laundry, meals
- Union fees

Offsets

- Dependants – name, DOB, and legal responsibilities
- Zone – if you live in a remote area you may be eligible for an offset
- Sole parent/spouse/housekeeper/low income/aged persons
- Spouse contributions to superannuation
- Superannuation pension rebates
- Private health insurance statement
- Medical receipts (if spent more than \$2,000)
- Imputation credit information from dividend statements

Investment property

- Water charges
- Bank fees
- Details of when property was rented, including any rental or Agents statements
- Date when property was purchased
- Capital costs
- Interest on loans
- Advertising fees
- Agent fees

- Body corporate fees
- Borrowing expenses
- Cleaning and general maintenance expenses
- Council rates
- Gardening/lawn mowing fees
- Insurance premiums paid
- Land tax details
- Deppro Report

Income earned statements

- Foreign sourced income
- Partnership distribution
- Rental Income
- Deductible amount for pension/annuities
- Payment summaries
- Capital Gains Tax statements (details of any assets sold)
- Lump sum payments eg: Eligible Termination Payment statements
- Social security, pensions, allowance statements
- Trust distribution statements
- Tax statements from Fund managers
- Bank statements - showing interest and fees
- Share dividend statements
- Contract notes for buy/sell transactions
- Tax statements from stockbrokers
- Income stream statements
- Life insurance Bonus Policy statements

Other useful information

- Credit card statement
- Bank statements (with account name and number, BSB number)
- Cheque butts
- Loan statements
- Last year's tax return
- Prior year tax losses
- Any tax credit vouchers

