

"Here's a handy checklist to help you find everything you need to do your tax return"

Accountant with any questions.

## Individual Tax Return Checklist - Advanced

Please collect your receipts, tax invoices and documents for the items below – check them off when you've found them – this will make your tax return appointment faster and easier.

Investment related deductions	☐ Capital costs
<ul> <li>Interest / fees on borrowing for investment</li> </ul>	☐ Interest on loans
purposes (bring statements)	☐ Advertising fees
<ul> <li>Asset purchase/sale agreements</li> </ul>	□ Agent fees
	□ Body corporate fees
Employment income deductions	□ Borrowing expenses
☐ List of work related expenses from ATO i.e.	<ul> <li>Cleaning and general maintenance expenses</li> </ul>
tools, income protection insurance	□ Council rates
□ Receipts or evidence of work related	☐ Gardening/lawn mowing fees
deductions eg: car, travel, laundry, meals	☐ Insurance premiums paid
□ Union fees	☐ Land tax details
	Income earned statements
Offsets	☐ Foreign sourced income
☐ Dependants – name, DOB, and legal	<ul><li>Partnership distribution</li></ul>
responsibilities	□ Rental Income
□ Evidence of children's (primary or secondary)	<ul> <li>Deductible amount for pension/annuities</li> </ul>
school expenses (computer, books, etc.)	□ Payment summaries
☐ Zone – if you live in a remote area you may be	☐ Capital Gains Tax statements (details of any
eligible for an offset	assets sold)
□ Sole parent/spouse/housekeeper/low	Lump sum payments eg: Eligible Termination
income/aged persons	Payment statements     Sacial acquirity page allowers.
<ul> <li>Spouse contributions to superannuation</li> </ul>	<ul> <li>Social security, pensions, allowance statements</li> </ul>
<ul> <li>Superannuation pension rebates</li> </ul>	☐ Trust distribution statements
<ul> <li>Private health insurance statement</li> </ul>	
<ul><li>Medical receipts (if spent more than \$1,500)</li></ul>	<ul><li>Tax statements from Fund managers</li><li>Bank statements - showing interest and fees</li></ul>
<ul> <li>Imputation credit information from dividend</li> </ul>	☐ Share dividend statements
□ Statements	<ul> <li>Contract notes for buy/sell transactions</li> </ul>
	☐ Tax statements from stockbrokers
Investment property	☐ Income stream statements
□ Water charges	☐ Life insurance Bonus Policy statements
□ Bank fees	Ene modrance Bender energy etatements
□ Details of when property was rented, including	Other deductions
any rental or Agents statements	
<ul> <li>Date when property was purchased</li> </ul>	☐ Tax Agent Fees
	Superannuation if self employed
Tick the hey beside the items that apply to	Receipts of gifts/donations to charity
✓ Tick the box beside the items that apply to	<ul> <li>Receipts of self-education expenses eg: books, computer costs, car expenses</li> </ul>
you.	☐ Financing lease statements
	☐ Income Protection premiums (bring
Don't worry if you aren't sure about any of	statements)
the items – contact your Etax Local	old Controlled



Other useful information	Dependants Details
<ul> <li>Credit card statement</li> <li>Bank statements (with account name and number,</li> <li>BSB number)</li> <li>Cheque butts</li> <li>Loan statements</li> <li>Previous year's accountant's fees</li> <li>Last year's tax return</li> <li>Prior year tax losses</li> </ul>	<ul> <li>Baby Bonus – Baby's Name &amp; DOB, if you had or gained legal responsibility of a child under five (after 30 June 2001)</li> <li>Amount of Family Tax Benefit received fortnightly</li> </ul> For new clients <ul> <li>Last year's Income Tax Assessment</li> </ul>
☐ Any tax credit vouchers	<ul><li>☐ Your ABN</li><li>☐ Any PAYG Instalments paid</li></ul>
NOTES:	

Contact Etax Local Accountants to arrange your tax return appointment today!

1300 174 689

www.etaxlocal.com.au