

## TAX RETURN CHECK LIST

### 2012 INDIVIAUL INCOME TAX RETURN

NAME: .....

ADDRESS: .....

CONTAC .....

NUMBER: .....

INFORMATION REQUIRED	YES	NO
<b>INCOMES</b>		
PAYG summary from employer, Centrelink	<input type="checkbox"/>	<input type="checkbox"/>
PAYG summary of super stream, lump sum from superannuation fund, RSA, Life Insurance Company	<input type="checkbox"/>	<input type="checkbox"/>
PAYG summary -non-super from life insurance company, friendly societies	<input type="checkbox"/>	<input type="checkbox"/>
PAYG summary- employment termination payment (ETP)	<input type="checkbox"/>	<input type="checkbox"/>
PAYG summary-PSI, labour hire, voluntary or withholding for no ABN quoted	<input type="checkbox"/>	<input type="checkbox"/>
Trust distribution statement and copies of trust tax return	<input type="checkbox"/>	<input type="checkbox"/>
Managed fund annual tax statement and capital gain tax statement	<input type="checkbox"/>	<input type="checkbox"/>
Partnership distribution statement and copy of partnership tax return	<input type="checkbox"/>	<input type="checkbox"/>
Dividend Statement	<input type="checkbox"/>	<input type="checkbox"/>
Bank statement, term deposit statement showing interest earned	<input type="checkbox"/>	<input type="checkbox"/>
Employee Share/option Schedule statement-employee summary	<input type="checkbox"/>	<input type="checkbox"/>
Buy/Sale of contract note for shares (if any shares were sold)	<input type="checkbox"/>	<input type="checkbox"/>
<b>DEDUCTIONS</b>		
Work related:		
Vehicle log book for motor vehicle expenses	<input type="checkbox"/>	<input type="checkbox"/>

Receipt & evidence of work related deduction, travel expenses, uniform	<input type="checkbox"/>	<input type="checkbox"/>
Receipt & evidence of work related self education expenses	<input type="checkbox"/>	<input type="checkbox"/>
Receipt for CPD courses and seminars, professional journals/subscriptions	<input type="checkbox"/>	<input type="checkbox"/>
Professional Membership	<input type="checkbox"/>	<input type="checkbox"/>
Receipt or evidence of depreciable asset bought during the year	<input type="checkbox"/>	<input type="checkbox"/>
Other deduction:		
Receipts for donations to registered charities	<input type="checkbox"/>	<input type="checkbox"/>
Expenses incurred in managing tax affairs	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in earning investment income	<input type="checkbox"/>	<input type="checkbox"/>
Income protection insurance premium	<input type="checkbox"/>	<input type="checkbox"/>
<b>RENTAL PROPERTY</b>		
Annual statement from property agent	<input type="checkbox"/>	<input type="checkbox"/>
Info when property was purchased or first rented out	<input type="checkbox"/>	<input type="checkbox"/>
Period property was rented out during income year	<input type="checkbox"/>	<input type="checkbox"/>
Loan statements for property, showing interest paid during income year	<input type="checkbox"/>	<input type="checkbox"/>
Details of depreciable assets bought or scrapped during income year	<input type="checkbox"/>	<input type="checkbox"/>
Expenses not on the property agent annual statement, i.e. insurance, land tax	<input type="checkbox"/>	<input type="checkbox"/>
Legal ownership percentage when owned by more than one individual	<input type="checkbox"/>	<input type="checkbox"/>
On disposal, info relating to dates, costs associated with acquisition, disposal	<input type="checkbox"/>	<input type="checkbox"/>
<b>OFFSET/REBATE</b>		
Details of dependants, age, income	<input type="checkbox"/>	<input type="checkbox"/>
Private health insurance statement	<input type="checkbox"/>	<input type="checkbox"/>
Details of medical expense where the total exceeds \$2,000	<input type="checkbox"/>	<input type="checkbox"/>
Detail of super contribution for spouse and any personal super contribution	<input type="checkbox"/>	<input type="checkbox"/>
<b>SOLE TRADER</b>		
Cash Book including records of drawing taken before the business takings are banked	<input type="checkbox"/>	<input type="checkbox"/>
Copies of BASs lodged	<input type="checkbox"/>	<input type="checkbox"/>
Copies of PAYG Summaries for employees	<input type="checkbox"/>	<input type="checkbox"/>
Details of any superannuation contribution for employees	<input type="checkbox"/>	<input type="checkbox"/>

<b>Payment of salaries and superannuation to associates</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Records from accounting software(Trial balance, P &amp; L, Balance Sheet)</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Statement of all liabilities of business</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Super contribution for self-employed persons</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>OTHER INFORMATION</b>		
<b>Copies of IASs lodged</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>OTHER NOTES:</b>	<input type="checkbox"/>	<input type="checkbox"/>