**TAX RETURN CHECKLIST** 

We will need you to bring information to assist us in preparing your income tax return.

Please check the following and bring along payment summaries, statements, accounts, receipts, etc., to help us prepare the return.

**Income/Receipts:**

 payment summaries for salary and wages;

 lump sum and termination payments;

 government pensions and allowances;

 other pensions and/or annuities;

 allowances (e.g., entertainment, car, tools);

 interest, rent and dividends;

 distributions from partnerships or trusts;

 details of any assets sold that were either used for income earning purposes or which may be caught by capital gains tax (CGT).

Common work-related claims made by individuals

1. Clothing expenses

 compulsory (or non-compulsory and registered) uniforms, and occupation specific and protective clothing;

 sun protection items;

 other expenses associated with maintaining work-related clothing.

2. Self education expenses

 course fees (but not HECS-HELP fees), student union fees, and tutorial fees;

 interest on borrowings used to pay for any deductible self education expenses.

 stationery and text books

3. Other work-related expenses

 books and trade journals;

 briefcases/luggage or suitcases;

 calculators, electronic organisers;

 electronic tablets;

 union fees;

 seminars and conferences;

 software;

 stationery;

 subscriptions to trade, professional or business associations;

 telephone expenses (work related calls)

 tools of trade.

 income protection insurance (excluding death and total/permanent disability).

**Deductions (in addition to those mentioned above):**

 car parking (when travelling on business);

 depreciation of tools and business equipment (incl. portion of home computer);

 gifts or donations;

 motor vehicle expenses (business/work related);

 superannuation contributions by sole traders or substantially unsupported taxpayers;

 interest and dividend deductions:

  account keeping fees

  ongoing management fees

  interest on borrowings to acquire shares

  advice relating to *changing* investments (but *not* setting them up);

 interest on loans to purchase equipment or income-earning investments;

 tax agent fees;

**Spouse details (if applicable), please enter amount where applicable.**

* Did you have a spouse for the full year financial year? …………………………………..………YES/NO
* If you had a spouse for only part of the income year, please specify the dates between 1 July 20XX to 30 June 20XX when you had a spouse:

From \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_\_\_\_\_ to \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_\_\_\_\_

* What was your spouse’s taxable income for the financial year? **$**........................................................
* Did your spouse have any reportable fringe benefits amounts for the tax
year? YES/NO
* Did your spouse receive any Australian Government pensions or allowances
(not including exempt pension income) in the tax year? YES/NO
* Did your spouse receive any exempt pension income in the tax year? YES/NO
* Does your spouse have any reportable super contributions for the tax year? YES/NO
* Did your spouse receive any tax-free government pensions paid under the *Military
Rehabilitation and Compensation Act 2004*? YES/NO
* Did your spouse receive any ‘target foreign income’ in the tax year? YES/NO
* Did your spouse have a total net investment loss (i.e., the total of any financial
investment loss and a rental property loss) for the tax year? YES/NO
* Did your spouse pay child support during the tax year? YES/NO

**Please don’t forget to bring your BSB and Account number for any refund**