

2019 INDIVIDUAL TAX RETURN CHECKLIST

PLEASE MAKE SURE YOU ATTACH DETAILS OF ALL ITEMS THAT APPLY TO YOU

PERSONAL INFORMATION	
NAME: _____	DATE OF BIRTH: _____
OCCUPATION: _____	TAX FILE NUMBER: _____
TELEPHONE: (M) _____ (H) _____	RESIDENTIAL ADDRESS: _____ _____
EMAIL ADDRESS: _____	_____
YOUR RETURN WILL BE UPLOADED TO YOUR CLIENT PORTAL FOR SIGNATURE:	
DO YOU HAVE A PORTAL? Y / N	
IF 'NO': PLEASE EMAIL ME A REGISTRATION TO: _____	
IF YOU THINK YOU ARE ELIGIBLE FOR A TAX REFUND, PLEASE ADVISE US OF YOUR BANK ACCOUNT DETAILS?	
ACCOUNT NAME: _____	_____
BSB: _____	_____
ACCOUNT NUMBER: _____	_____
DID YOU LIVE OVERSEAS FOR A PERIOD LONGER THAN 6 MONTHS? Y / N	
DATES IF 'YES' _____	
IF YOUR RETURN IS URGENT PLEASE INDICATE THE DATE YOU REQUIRE IT TO BE RECEIVED BY YOU:	

NB: This Checklist is only a guide to help us declare all income and deductions that are required, please add any other information where you feel necessary.

INFORMATION PROVIDED	INCOME - INFORMATION
	PAYG payment summaries (eg from employers)
	Lump sum payments (eg employment termination payment)
	Partnership distribution statement, including copy of partnership tax return
	Trust distribution statement, including copy of trust tax return
	Documentation re foreign source income, foreign assets or property
	Bank statements stating interest earned, including for term deposits
	Dividend statements
	Employee share scheme statements
	Managed fund annual tax statement and capital gains tax statement
	Buy/sell contract notes for any share transactions

INFORMATION PROVIDED	WORK-RELATED DEDUCTIONS - INFORMATION
	Details of depreciable assets bought during the year (eg laptops)
	Details and receipts for home office expenses
	Professional journals/trade magazines
	Professional memberships/subscriptions
	Receipts for continuing professional development courses and seminars
	Receipts for self-education expenses
	Receipts for other work-related deductions such as protective clothing, uniform expenses, tools and equipment, and travel
	Vehicle logbook for motor vehicle expenses (if using the logbook method)

INFORMATION PROVIDED	OTHER DEDUCTIONS - INFORMATION
	Receipts for donations of \$2 and over to deductible gift recipients
	Expenditure incurred in managing tax affairs (eg tax agent fees)
	Expenditure incurred in earning interest, dividend and other investment income (eg investment advice fees)
	Income protection insurance premiums

INFORMATION PROVIDED	RENTAL PROPERTIES - INFORMATION
	Date when property was purchased, including details of co-ownership if applicable
	Period property was rented out during the income year
	Records detailing rental income (annual statement from property agent, if engaging services of an agent)
	Loan statements for property showing interest paid for the income year
	Expenses incurred such as water charges, land tax and insurance premiums
	Details of depreciable assets bought or disposed of during the year
	Details of any capital works on the property
	If the property was disposed of during the income year, information relating to dates and costs associated with the disposal of the property

INFORMATION PROVIDED	OFFSETS/REBATES- INFORMATION
	Details of any superannuation contributions for spouse
	Details of dependants, including their age, occupation and income
	Private health insurance statement (and details of prepaid premiums)

INFORMATION PROVIDED	IF OPERATING AS A SOLE TRADER - INFORMATION
	Cashbook, which includes records of drawings taken before the business takings were banked
	Copies of Business Activity Statements lodged
	Copies of PAYG summaries for employees
	Details of any government grants, rebates or payments received
	Details of superannuation contributions for employees
	Details of any assets purchased, including date of purchase and amount
	Payments of salaries and superannuation to associates
	Records from accounting software (eg trial balance, profit and loss, and balance sheet)
	Statements of all liabilities of the business.
	Notice of superannuation contributions

INFORMATION PROVIDED	OTHER - INFORMATION
	Copies of Instalment Activity Statements lodged
	Any other information that you think is relevant