

TAX CHECKLIST – INDIVIDUAL

The following checklist should assist you to collate your records and information for the preparation of your accounts.

Please tick (☑) next to relevant documentation supplied, sign the bottom of this form where indicated, and return with your documentation.

GENERAL

- Last Year's Income Tax Return
- Details of any purchases or sale of shares, property, business
- Private Health Insurance Details
- Spouse Details
- Children's details including D.O.B and whether you currently receive any Centrelink benefits

INCOME

- PAYG Summaries
- Pensions or Government payments/Allowances
- Interest earned for the relevant year from the banks, building societies or other institutions.
- Dividend Statements
- Details of any rental property income
- Details of any business income
- Details of any other income earned

EXPENSES

- Work Related Expenses (tools, education, uniform, union fees)
- Motor Vehicle Expenses (estimation of Kilometres if no logbook kept, otherwise logbook and all expense items)
- Travel Expenses
- Investment Expenses (bank fees, financial advisors fees, investment borrowings etc)
- Rental Property Expenses (rates, body corporate, property agents fees, borrowing cost insurance, interest on loan, repairs and maintenance, cleaning, pest control, gardening, travel, water rates, depreciation schedule, etc)
- Donations
- Cost of managing tax affairs

I, _____, have provided the documentation indicated above to Accounting ONE. Signed: _____