

Tax return checklist

Please complete the form for your records

Client Name: _____ Signature: _____

INDIVIDUALS		✓	N/A
1	PAYG summaries (group certificates) Your job title and job description:.....		
2	Eligible Termination Payments (ETPs)		
3	Pensions, annuities, Centrelink benefits		
4	Dividend income statements for dividends received		
5	Interest income details for interest received on all bank accounts and term deposits		
6	Trust distribution tax statements for trust distributions received		
7	Share transaction details (date of purchase & sale, quantity, cost and proceeds) Please provide details of any Employee Share Schemes as an election may be required		
8	Property sale details (copy of offer & acceptance and settlement statement)		
9	Property purchase details (copy of offer & acceptance and settlement statement)		
10	Other income (specify)		
11	Foreign source income		
12	Private health insurance statements		
13	Spouse's taxable income.		
14	Details of work related expenditure eg: <ul style="list-style-type: none"> • Uniform • Travel • Donations • Subscriptions & professional fees • Self education • Motor vehicle expenses (included business km travelled per year) 		
15	Rental property statements and other rental income & expenditure details		
16	Interest expenses details for loans for investments, rental properties, etc		
17	Other deduction expenses (please specify)		
18	Instalment activity statements and/or details of Pay As You Go (PAYG) instalments paid		
19	Superannuation contributions for non-employer sponsored or low income employees		
20	Net medical expenses >\$1,500		
21	Other capital income/deductions not specified above		
22	Please note Family Tax Benefits can no longer be claimed through your tax return from 1 July 2009. You need to go directly to Centrelink to claim your benefit for 2009 and prior years.		
23	If you receive Family Tax Benefit Part A please supply your child/rens education expenses up to \$780 for primary school or \$1558 for secondary school, to claim the Education Refund.		
24	Did you stop full time education any time during the 2010 year?		