

## Individual Tax Return Checklist – Advanced

Please collect your receipts, tax invoices and documents for the items below – check them off when you've found them – this will make your tax return appointment faster and easier.

### INVESTMENT RELATED DEDUCTIONS

- ☐ Interest / fees on borrowing for investment purposes (bring statements)
- ☐ Asset purchase/sale agreements

### EMPLOYMENT INCOME DEDUCTIONS

- ☐ List of work related expenses from ATO i.e. tools, income protection insurance
- ☐ Receipts or evidence of work related deductions, e.g. car, travel, laundry, meals
- ☐ Union fees

### OFFSETS

- ☐ Zone – if you live in a remote area you may be eligible for an offset
- ☐ Spouse contributions to superannuation
- ☐ Private health insurance statement

### INVESTMENT PROPERTY

- ☐ Water charges
- ☐ Bank fees
- ☐ Details of dates when property was rented, including any rental or agents statements
- ☐ Date of when property was purchased
- ☐ Capital costs
- ☐ Interest on loans
- ☐ Advertising fees
- ☐ Agent fees
- ☐ Body corporate fees
- ☐ Borrowing expenses
- ☐ Cleaning and general maintenance expenses
- ☐ Council rates
- ☐ Gardening/lawn mowing fees
- ☐ Insurance premiums paid
- ☐ Land tax details

### INCOME

- ☐ Foreign sourced income
- ☐ Partnership distribution
- ☐ Rental income
- ☐ Pensions/annuities
- ☐ Payment summaries
- ☐ Capital Gains Tax statements (details of any assets sold)

- ☐ Lump sum payments e.g. Eligible termination
- ☐ Centrelink, pensions, allowance statements
- ☐ Trust distribution statements
- ☐ Tax statements from Fund managers
- ☐ Bank statements – showing interest and fees
- ☐ Share dividend statements
- ☐ Contract notes for buy/sell transactions
- ☐ Tax statements from stockbrokers
- ☐ Income Stream statements
- ☐ Life insurance Bonus Policy statements

#### OTHER DEDUCTIONS

- ☐ Tax agent fees
- ☐ Superannuation if self employed
- ☐ Receipts of gifts/donations to charity
- ☐ Receipts of self-education expenses, e.g. books, computer costs, car expenses
- ☐ Financing lease statements
- ☐ Income Protection premiums (bring statements)

#### OTHER USEFUL INFORMATION

- ☐ Credit card statement
- ☐ Bank statements (with account name and number)
- ☐ Cheque books
- ☐ Loan statements
- ☐ Previous year's accountant's fees
- ☐ Last year's tax return
- ☐ Prior year's tax losses

#### FOR NEW CLIENTS

- ☐ Last year's Income Tax Assessment
- ☐ Your ABN
- ☐ Any PAYG Instalments paid
- ☐ TFN – to be provided prior to app.
- ☐ Date of Birth – to be provided prior to app.