

## 2009 Individual Tax Return Checklist

Name of taxpayer: \_\_\_\_\_

Address: \_\_\_\_\_

Preferred Contact No: \_\_\_\_\_

Information	Information Provided	Not Applicable
<p><b>Income</b></p> <p>PAYG summaries from employers, Centrelink and/or superannuation funds</p> <p>Lump sum payments (eg Employment Termination Payment)</p> <p>Trust distribution statement, including copy of the trust's tax return</p> <p>Managed fund annual tax statement and capital gains tax statement</p> <p>Partnership distribution statement, including a copy of the partnership's tax return</p> <p>Dividend statements</p> <p>Bank statements detailing interest earned</p> <p>Term deposit statements detailing interest earned</p> <p>Buy/sell contract notes for shares (if any shares were sold) and cost base information including amount paid and purchase date of shares</p> <p>Foreign income, including employment, dividends, interest and rent.</p>		
<p><b>Work-related Deductions</b></p> <p>Details of depreciable assets bought during the year (eg laptops), including date of purchase</p> <p>Professional journals/magazines</p> <p>Professional memberships/subscriptions</p> <p>Receipts for continuing professional development courses and seminars</p> <p>Receipts for self-education expenses</p> <p>Receipts or evidence of work-related deductions such as protective clothing, uniform expenses, travel, internet and mobile phone</p> <p>Vehicle logbook for motor vehicle expenses (if using the logbook method)</p>		
<p><b>Other Deductions</b></p> <p>Receipts for donations of \$2 and over to registered charities</p> <p>Expenditure incurred in managing tax affairs (eg tax agent's fees)</p> <p>Expenditure incurred in earning investment income , including interest expenses</p> <p>Income protection insurance premiums</p>		



<p><b>Rental Properties</b></p> <p>Annual statement from property agent (if engaging the services of an agent)</p> <p>Date of when property was purchased and when first available for rent</p>		
<p>Details of depreciable assets bought or disposed during the year</p> <p>Expenses (which are not detailed on the property agent annual statement) incurred, such as water charges, land tax and insurance premiums</p> <p>If property is held by more than one individual, details of owners and their legal ownership percentage</p> <p>If property was disposed off during the income year, information relating to dates and costs associated with the acquisition and disposal of the property</p> <p>Loan statements for property showing interest paid for the income year</p> <p>Period that property was rented out during the income year</p> <p>Records detailing rental income (if not engaging the services of an agent)</p> <p>Records of expenses relating to the property (if not engaging the services of an agent)</p>		
<p><b>Offsets / Rebates</b></p> <p>Details of any superannuation contributions for spouse</p> <p>Details of dependants, including their age, occupation and income</p> <p>Summary of medical expenses where the total exceeds \$1,500 (after Medicare and private health fund rebates)</p> <p>Private health insurance statement (if insurance is held with partner, please state who is the primary holder and provide the age of partner)</p>		
<p><b>If Operating as a Sole Trader</b></p> <p>Cashbook, which includes records of drawings taken before the business takings are banked</p> <p>Copies of Business Activity Statements lodged</p> <p>Copies of PAYG Payment summaries for employees</p> <p>Details of any government grants, rebates or payments received</p> <p>Details of superannuation contributions for employees</p> <p>Payments of salaries and superannuation to associates</p> <p>Records from accounting software (eg trial balance, P&amp;L and and balance sheet)</p> <p>Statements of all liabilities of the business</p> <p>Superannuation contributions for self-employed persons</p>		
<p><b>Other Information</b></p> <p>Copies of Instalment Activity Statements lodged</p> <p>If you have any doubt about any income or expenses you have received or incurred, bring the documents in with you</p> <p>Any other information that you think is relevant</p>		