

Your 2009 tax checklist

Preparation of individual tax returns



We have created the following checklist to help you prepare for your individual tax return. The checklist outlines the key documents and information that we require to quickly and efficiently prepare your tax return. If mailing or dropping your records to us please, please attach this tax checklist and complete your details below:

Client Name:		
Contact Details:	Ph.	Email:

Income Details

- PAYG Payment Summaries, Statements of Earnings
- Pension, Social Security, Austudy / Abstudy, Parenting Allowance statements
- Retirements Benefits, Statements of Eligibility Termination Benefits & PAYG Summaries
- Superannuation Pensions and Annuities including Undeducted Purchase Price
- Interest from Bank Accounts including Bank, Account Number and Interest Received
- Dividends from all companies including Imputation Credits
- Statements regarding any other income source such as employee share schemes, directors fees or contract work
- Annual Tax Statements of managed investment funds
- Rental Property income and expenses, including agent statements
- Capital Gains: including the cost price/date purchased and the selling price/date sold
- Trust Distributions: including your tax summary sheet supplied by the Trust
- Partnership Distribution – Copy of Return is Required
- Income from overseas (eg: UK pension, Italy)
- For shares sales or purchase , the purchase and sale contracts, and if under a Dividend ReInvestment Arrangement Prior Dividend Statements or a Ledger from Share Register detailing acquisitions
- For real estate sales or purchases, all the correspondence from your lawyer, including Sale/Purchase Contract and Settlement Sheet, along with all Finance Information.

Deductions

- Motor Vehicle Expenses or number of Kilometres travelled and/or log book
- Purchase/Maintenance of uniforms, Purchase of Protective Clothing, Dry Cleaning Expenses
- Self Education Expenses
- Work related expenses such as Union Fees, Telephone Calls, OT Meals, Registration/License
- Deductions of fees against your Interest Income
- Donations to registered charities (this does not include purchase of raffle tickets)
- The purchase price of Australian or foreign Pensions or annuities
- Accountancy or Tax Agent Fees
- Other Expenditure that you might consider relevant to your Income tax return

Rebate & Other Details

- Private Health Insurance Yearly Statement, Medical Expenses – Medicare & Private
- Investment & Education (as announced in Budget)
- Superannuation Contributions, HECS Debts, Supplementary Loan Details
- Spouse, details including there taxable income
- Any other details that you might consider relevant to your income tax return