



Checklist for your 2017 Income Tax Return

BANK DETAILS

- ✚ BSB, Account number & name on **account for refund purposes only.**

PAYG PAYMENT SUMMARIES

- ✚ Income from **ALL** jobs during the year
- ✚ Include Centrelink payments
- ✚ Payouts on leaving: Employment Termination Payments
- ✚ Employee Share Scheme Statement
- ✚ Superannuation pension / payment advice

INTEREST EARNED

- ✚ Interest earned on Bank Accounts including Term Deposits & Share saver Accounts - Bank Statements or Summary
- ✚ Name of Account Holder (Joint Names?)

CONTRACT/BUSINESS INCOME

- ✚ ABN Number
- ✚ Registered Business Trading Name
- ✚ Cashbook/software datafile/login details
- ✚ Type of income
- ✚ All business related expenses you wish to claim
***See small business deductions checklist**

SHARES AND INVESTMENTS

- ✚ Details of dividends received:
- ✚ Copies of Dividend advice slips including Dividend Reinvestment Plan (Usually 2 for each year, based on payment date)
- ✚ Sale of Shares:
 - Buy & Sell contracts showing:
 - Date of sale, Number of shares sold and Amount received.
 - Date purchased, Number of shares purchased and amount paid for shares.
- ✚ Share Portfolio & Managed Fund Annual Tax Summaries.
- ✚ Margin Lending interest.

RENTAL PROPERTIES

- ✚ See separate rental property checklist

WORK RELATED EXPENSES

- ✚ Work related travel
- ✚ Work related vehicle use (see motor vehicle deductions)
- ✚ Work related telephone (home)*
- ✚ Percentage of computer / Internet for work*
- ✚ Mobile Phone Costs (work percentage)*
- ✚ Stationery
- ✚ Books or Journals
- ✚ Union Fees
- ✚ Membership to Professional Bodies
- ✚ Uniform or Protective Clothing and Laundry
- ✚ Sun protection costs
- ✚ Self-Education expenses
- ✚ Tools Purchased
- ✚ Tax Agent Fees
- ✚ Income Protection Insurance
***Have you logged the usage?**

MOTOR VEHICLE DEDUCTIONS

- ✚ Summary of Fuel, Repairs, Insurance, Registration, Tyres, Interest on Loan, Depreciation, Hire Purchase Charges.
- ✚ Photocopy of log book entries
- ✚ Details of vehicle (date purchased, cost, make, model, Odometer reading 01/07/16 & 30/06/17)
- ✚ Copies of loan statements or the hire purchase agreements
- ✚ Number of KM travelled for work purposes.
- ✚ Can you prove you own the vehicle?

REBATES

- ✚ Details of Spouse / Defacto Taxable Income
- ✚ Spouse's date of birth
- ✚ Spouse's tax file number
- ✚ Amount of Parenting Allowance received
- ✚ Number of dependants, their dates of birth and name of school
- ✚ Zone offset is only available if you reside permanently in a remote area (**No longer available for FIFO workers**)
- ✚ Medical costs now **only available for disability aids, attendant care or aged care.**
- ✚ Amount of Child Support paid by self and/or partner.

DONATIONS

- ✚ Charities name & amount contributed
- ✚ Deductions gift recipient receipt

HECS/HELP & SUPERANNUATION CLAIMS

- ✚ Higher Education Loan Statement
- ✚ Confirmation letter from Superannuation Fund acknowledging that you are claiming a deduction for contributions made.

NEW CLIENTS – Copy of last tax return

PRIVATE HEALTH INSURANCE

- ✚ Annual Private Health Insurance Statement – statement **MUST** be provided

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