robertson scannell

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Individual Tax Return Checklist

When you come in to see us at tax time, please bring the following items to assist us in completing your tax return quickly.

Income

☐ Employment Income
☐ Centrelink / Pension Income
☐ Employment Termination Payment (ETP)
☐ Annuity & Superannuation Income Stream Statements/ Lump Sum Payments
☐ Bonuses from Life Companies and Friendly Societies
☐ Interest Earned
☐ Dividends Statements
☐ Trust Distribution and Capital Gains Statements
☐ Foreign Source Income
☐ Business Income
☐ Employee Share Scheme Statements

Tax Deductions

☐ Work Related Motor Vehicle Expenses (make & model required, log book may be required)
☐ Work Related Travel Expenses (E.g. tolls, accommodation, meals)
☐ Work Related Clothing & Laundry Expenses
☐ Work Related Self-Education Expenses
☐ Dividend & Interest Deductions
☐ Tax Deductible Gifts & Donations
☐ Income Protection Insurance
☐ Union Fees
☐ Home Office Expenses
☐ Seminars
☐ Overtime Meals (If received an allowance)
☐ Tools & Equipment
☐ Computer, Internet & Software Expenses
☐ Memberships & Subscriptions
☐ Telephone & Mobile Phone
☐ Sun Protection Receipts
☐ Personal Superannuation Contributions & Notice of Intent to Claim

Other Useful Information

☐ Child Support Agency Payments
☐ Private Health Insurance Statement
☐ Dependants – Name, DOB
☐ Zone – If living in a remote area (Dates)
☐ Spouse Contributions to Superannuation

Investment Property Information

☐ Annual Rental Agent Statement
☐ Rental Income
☐ Advertising for Tenants
☐ Bank Loan Statements (for Interest & Charges)
☐ Body Corporate Levies
☐ Cleaning
☐ Council & Water Rates
☐ Gardening & Lawn mowing
☐ Insurance
☐ Land Tax
☐ Pest Control
☐ Property Management Fees/Commission
☐ Repairs & Maintenance
☐ Stationery, Telephone & Postage
☐ Replacements & Improvements

For New Investment Properties

☐ Date the Property was first available to rent
☐ Date the Property was built
☐ Depreciable Items (E.g. Air conditioning, Hot Water System, Stove)
☐ Quantity Surveyor Report

Capital Acquisitions & Disposals

☐ Copy of Contract and Settlement Statements for assets purchased or sold
(E.g. Shares, Investment Properties)

New Clients

☐ Last year's Income Tax Assessment
☐ Last year's Tax Return
☐ Previous year's Accounting Fees
☐ Bank account details (Bank account name, number & BSB)

Ask us how we can help you find the right home loan that best suits you and your circumstances, with our in-house finance broker.