

2015 Individual Tax Return Checklist

Name of taxpayer: _____

Address: _____

Preferred contact no.: _____

Information	Information Provided	Not Applicable
Income PAYG payment summaries (eg from employers) Lump sum payments (eg employment termination payment) Partnership distribution statement, and a copy of partnership's tax return Trust distribution statement, and a copy of trust's tax return Documentation regarding foreign source income, foreign assets or property Bank statements stating interest earned, including for term deposits Dividend statements Employee share scheme statements Managed fund annual tax statement and capital gains tax statement Buy/sell contract notes for shares (if any shares were sold)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Work-related Deductions Details of depreciable assets bought during the year (eg laptops) Details and receipts for home office expenses Professional journals/trade magazines Professional memberships/subscriptions Receipts for continuing professional development courses and seminars Receipts for self-education expenses Receipts for other work-related deductions such as protective clothing, uniform expenses, tools and equipment, and travel Vehicle logbook for motor vehicle expenses (if using the logbook method)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Other Deductions Receipts for donations of \$2 and over to registered charities Expenditure incurred in managing tax affairs (eg tax agent's fees) Expenditure incurred in earning interest, dividend and other investment income (eg investment advice fees) Income protection insurance premiums	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Information	Information Provided	Not Applicable
<p>Rental Properties</p> <p>Date when property was purchased, including details of co-ownership if applicable</p> <p>Period property was rented out during the income year</p> <p>Records detailing rental income (annual statement from property agent, if engaging services of an agent)</p> <p>Loan statements for property showing interest paid for the income year</p> <p>Expenses incurred such as water charges, land tax and insurance premiums</p> <p>Details of depreciable assets bought or disposed of during the year</p> <p>Details of any capital works on the property</p> <p>If the property was disposed of during the income year, information relating to dates and costs associated with the disposal of the property</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<p>Offsets/Rebates</p> <p>Details of any superannuation contributions for spouse</p> <p>Details of medical expenses where the total exceeds \$2,218 (after Medicare and private health fund rebates)</p> <p>Details of dependants, including their age, occupation and income</p> <p>Private health insurance statement (and details of prepaid premiums)</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<p>If Operating As a Sole Trader</p> <p>Cashbook, which includes records of drawings taken before the business takings were banked</p> <p>Copies of Business Activity Statements lodged</p> <p>Copies of PAYG summaries for employees</p> <p>Details of any government grants, rebates or payments received</p> <p>Details of superannuation contributions for employees</p> <p>Details of any assets purchased, including date of purchase and amount</p> <p>Payments of salaries and superannuation to associates</p> <p>Records from accounting software (eg trial balance, profit and loss (P&L) and balance sheet)</p> <p>Statements of all liabilities of the business</p> <p>Notice of superannuation contributions for self-employed persons</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<p>Other Information</p> <p>Copies of Instalment Activity Statements lodged</p> <p>Any other information that you think is relevant</p>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>