



2017 Income Tax Return Checklist - Individuals

Client Name: _____ Email: _____
 Phone no: _____

INCOME

	Category	Y/N	Document	Notes
1	Salary or wages		PAYG group certificates	
2	Allowances, earnings, tips, director's fees		Bank records, other corro	
3	Employment termination payments		ETP statements	
4	Pensions, annuities, Centrelink payments		PAYG group certificates, tax statements	
5	Superannuation lumpsums		Stmnt from Payee	
6	Interest received		Bank statements showing any tax withheld if applicable	
7	Dividends received		Dividend notices	
8	Trust/partnership distributions		Tax statements	
9	Employee share schemes		Employee share scheme statement	
10	Rental income		Details of income and expenditure	
11	Business income		Details of income and expenditure	
12	Capital gain – did you make a capital gain or loss this year?			
13	Other income		Details	
14	Foreign income		Details	

DEDUCTIONS

	Category	Y/N	Document	Notes
1	Work related car		Mileage only applicable if using for vehicle for work purposes (not home to work and back)	
1.1	Did you maintain a logbook for 12 consecutive weeks?		Details	
2	Work related travel		Travel related to employment (flights etc)	
2.1	Did you maintain a travel diary?		Details	
3	Uniform and laundry		Provide details (uniform is limited to occupation specific clothing eg. Nurses uniform. Normal attire does not qualify.	
4	Self-education		Details of course studied, education provider and costs incurred	
5	Other work related		Licenses, union dues, subscriptions, computer expenses, mobile, internet and stationery.	
6	Interest expenses		Interest on investment loans	
7	Gifts and donations		Donation receipts	
8	Cost of managing tax affairs		Invoice from tax agent	
9	Personal superannuation contributions		Date paid and fund name	
10	Other deductions		Income protection premiums	
11	Tax losses from prior years		Details	

OTHER DETAILS

	Category	Y/N	Document	Notes
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