

## 2018 Income Tax Return Checklist - Individuals

Client Name: _	Email:	
Phone no:		

## **INCOME**

	Category	Y/N	Document	Notes
1	Salary or wages		PAYG group	
	, c		certificates	
2	Allowances, earnings, tips,		Bank records,	
	director's fees		other corro	
3	Employment termination		ETP statements	
	payments			
4	Pensions, annuities, Centrelink		PAYG group	
	payments		certificates, tax	
			statements	
5	Superannuation lumpsums		Stmt 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	
L			expenditure	
11	Business income		Details of	
			income and	
40	Conital rain did vav males s		expenditure	
12	Capital gain – did you make a			
10	capital gain or loss this year? Other income		Details	
13				
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 Interest paid to ATO	
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
1	Spouse		Details – name, date of birth, tax file number, taxable income	
2	Dependent children		Number and ages	
3	Private health insurance		Details of policy	
4	Medical expenses rebate		Limited to care for disabled dependants. No claim for normal out-of-pocket costs.	
5	Zone – did you live and work in remote zone?		Location and dates	
6	Did you become a tax resident during the year?			
7	Did you cease to be a tax resident during the year?			
8	Did you have a Medicare exemption?		Details	
9	Do you have a HELP or SFSS student loan?		Details	
10	PAYG income tax instalments		Details of PAYG payments made during the year	

year tax situation:	