

2012 Individual Tax Return Checklist

Name of taxpayer: _____

Address: _____

Preferred Contact No: _____

Information	Information Provided	Not Applicable
<p>Income</p> <p>PAYG summaries eg from employers</p> <p>Lump sum payments (eg Employment Termination Payment)</p> <p>Trust distribution statement, including copy of the trust's tax return</p> <p>Managed fund annual tax statement and capital gains tax statement</p> <p>Partnership distribution statement, including a copy of the partnership's tax return</p> <p>Dividend statements</p> <p>Bank statements stating interest earned</p> <p>Term deposit statements stating interest earned</p> <p>Buy/sell contract notes for shares (if any shares were sold)</p>	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>
<p>Work-related Deductions</p> <p>Details of depreciable assets bought during the year (eg laptops)</p> <p>Professional journals / magazines</p> <p>Professional memberships / subscriptions</p> <p>Receipts for continuing professional development courses and seminars</p> <p>Receipts for self-education expenses</p> <p>Receipts for other work related deductions such as protective clothing, uniform expenses and travel</p> <p>Vehicle logbook for motor vehicle expenses (if using the logbook method)</p>	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>
<p>Other Deductions</p> <p>Receipts for donations of \$2 and over to registered charities</p> <p>Expenditure incurred in managing tax affairs (eg tax agent's fees)</p> <p>Expenditure incurred in earning investment income</p> <p>Income protection insurance premiums</p>	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>
<p>Rental Properties</p> <p>Annual statement from property agent (if engaging the services of an agent)</p> <p>Date when property was purchased</p> <p>Details of depreciable assets bought or disposed during the year</p>	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>

Information	Information Provided	Not Applicable
<p>Expenses incurred, which are not detailed on the property agent annual statement, such as water charges, land tax and insurance premiums</p> <p>If property is held by more than one individual, please provide details of owners and their legal ownership percentage</p> <p>If property was disposed of during the income year, information relating to dates and costs associated with the acquisition and disposal of the property</p> <p>Loan statements for property showing interest paid for the income year</p> <p>Period property was rented out during the income year</p> <p>Records detailing rental income (if not engaging the services of an agent)</p> <p>Records of expenses relating to the property (if not engaging the services of an agent)</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 dependants, including their age, occupation and income</p> <p>Details of medical expenses where the total exceeds \$2,060 (after Medicare and private health fund rebates)</p> <p>Private health insurance statement (if insurance is held with your partner, please state who is the primary holder and provide the age of your partner)</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, 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"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<p>Other Information</p> <p>Copies of Instalment Activity Statements lodged</p> <p>Details of any employee share scheme</p> <p>Any other information that you think is relevant</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>