

INDIVIDUAL CHECKLIST

INCOME	DEDUCTIONS	TAX OFFSETS
PAYG Payment Summary (Group Certificate) – if you have them	Work Related Expenses Including:-	Superannuation Contributions for Spouse
Govt or Centrelink Payments	Uniforms / Protective Clothing / Laundry	Private Health Insurance Statements – only if received
Interest Received from Savings	Home Office Expenses	Spouse Income & Details
Income Received on Shares & Managed Fund Statements	Subscriptions	Dependent Children Details
Pension or Annuity Payment Summaries	Professional Journals	Zone – Remote area details
Foreign Source Income	Motor Vehicle Expenses – log book	DVA Pension & Defence Force Medicare Levy Exemption Certificate
Lump Sum & Termination Payments	Local / Overseas Travel Expenses involving overnight stays	ADJUSTMENTS
Details of Capital Gains / Losses	Sun Protection Items	Credit for interest on early payment of tax (date & amount paid)
Purchase & Sale Settlement Statements	Tools & Equipment, New Assets & Repairs	PAYG Installments paid for the year
Income from Trusts & Partnerships	Telephone & Internet Expenses	Super Contributions for Govt Co-Contribution scheme
Business Income	Self – Education Expenses	Personal Super Contributions – Notice of intent required
Employee Share Scheme Statements	Donations of \$2 and over	Bank Account Details – Account name, BSB & Account Number required for all refunds from the ATO
Foreign Income	Tax Agent Fees	
Any other Income	Personal Super Contribution Income Protection Policy Statement	

RENTAL PROPERTY CHECKLIST

Income		Expenses	
Gross Rent Received	\$	Advertising for tenants	\$
Any insurance claims received	\$	Body Corporate Fees	\$
Any costs reimbursed by tenant	\$	Cleaning	\$
Details of private use of the property (if any)		Gardening / Lawn Mowing	\$
		Interest on Loans	\$
Details of New Assets Purchased -Items, dates and amounts		Legal Fees	\$
		Property Management Fees	\$
		Repairs & Maintenance	\$
		Water Charges	\$
Please bring these documents to your interview:		Bank Fees on Loans	\$
Investment loan statements		Borrowing Expenses	\$
Property Management statements		Council Rates	\$
New rental property contract		Insurance	\$
If property sold		Land Tax	\$
Date of Contract		Pest Control	\$
Settlement Statement		Stationery, Telephone, Postage	\$