2012 Individual Tax Return Checklist

Name of taxpayer: ______________________________

Address: ______________________________

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Preferred Contact No: ______________________________

Information	Information Provided	Not Applicable
Income		
PAYG summaries eg from employers	☐	☐
Lump sum payments (eg Employment Termination Payment)	☐	☐
Trust distribution statement, including copy of the trust's tax return	☐	☐
Managed fund annual tax statement and capital gains tax statement	☐	☐
Partnership distribution statement, including a copy of the partnership's tax return	☐	☐
Dividend statements	☐	☐
Bank statements stating interest earned	☐	☐
Term deposit statements stating interest earned	☐	☐
Buy/sell contract notes for shares (if any shares were sold)	☐	☐
Work-related Deductions		
Details of depreciable assets bought during the year (eg laptops)	☐	☐
Professional journals / 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 and travel	☐	☐
Vehicle logbook for motor vehicle expenses (if using the logbook method)	☐	☐
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 investment income	☐	☐
Income protection insurance premiums	☐	☐
Rental Properties		
Annual statement from property agent (if engaging the services of an agent)	☐	☐
Date when property was purchased	☐	☐
Details of depreciable assets bought or disposed during the year	☐	☐

Information	Information Provided	Not Applicable
Expenses incurred, which are not detailed on the property agent annual statement, such as water charges, land tax and insurance premiums	☐	☐
If property is held by more than one individual, please provide details of owners and their legal ownership percentage	☐	☐
If property was disposed of during the income year, information relating to dates and costs associated with the acquistion and disposal of the property	☐	☐
Loan statements for property showing interest paid for the income year	☐	☐
Period property was rented out during the income year	☐	☐
Records detailing rental income (if not engaging the services of an agent)	☐	☐
Records of expenses relating to the property (if not engaging the services of an agent)	☐	☐
Offsets / Rebates		
Details of any superannuation contributions for spouse	☐	☐
Details of dependants, including their age, occupation and income	☐	☐
Details of medical expenses where the total exceeds $2,060 (after Medicare and private health fund rebates)	☐	☐
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)	☐	☐
If Operating as a Sole Trader		
Cashbook, which includes records of drawings taken before the business takings were banked	☐	☐
Copies of Business Activity Statements lodged	☐	☐
Copies of PAYG summaries for employees	☐	☐
Details of any Government grants, rebates or payments received	☐	☐
Details of superannuation contributions for employees	☐	☐
Details of any assets purchased, including date of purchase and amount	☐	☐
Payments of salaries and superannuation to associates	☐	☐
Records from accounting software (eg trial balance, P&L and balance sheet)	☐	☐
Statements of all liabilities of the business	☐	☐
Notice of superannuation contributions for self-employed persons	☐	☐
Other Information		
Copies of Instalment Activity Statements lodged	☐	☐
Details of any employee share scheme	☐	☐
Any other information that you think is relevant	☐	☐