

2009 Individual Tax Return Checklist

Income

- PAYG summaries from employers, Centrelink and/or superannuation funds
- Lump sum payments (eg Employment Termination Payment)
- Managed fund annual tax statement and capital gains tax statement
- Income from trusts and partnerships. Statements of distribution should be provided where appropriate
- Dividend statements
- Bank and Term Deposit statements detailing interest earned
- Directors Fees
- Buy/sell contract notes for shares sold
- Foreign source (employment and pension) income and details of any foreign tax credits

Work Related Deductions

- Details of depreciable assets bought during the year (eg laptops)
- Receipts or evidence of work-related deductions such as protective clothing, uniform expenses and travel
- Vehicle logbook for motor vehicle expenses (if using the logbook method) or actual work kms travelled
- Professional journals/magazines
- Professional memberships/subscriptions
- Receipts for continuing professional development courses and seminars
- Receipts for self-education expenses
- For self-employed persons details of any superannuation contributions made and those without employer superannuation support

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 of when property was purchased
- Period that property was rented out during the income year
- Records detailing rental income (if not engaging the services of an agent)
- Details of depreciable assets bought or disposed during the year
- Expenses (which are not detailed on the property agent annual statement) incurred, such as water charges, land tax and insurance premiums
- Loan statements for property showing interest paid for the income year
- If property was disposed of during the income year, information relating to dates and costs associated with the acquisition and disposal of the property

Offsets / Rebates

- Details of dependants, including their age, occupation and income
- Details of medical expenses where the total exceeds \$1,500 (after Medicare and private health fund rebates). Private health insurance statement (if insurance is held with partner, please state who is the primary holder and provide the age of partner)
- Receipts for Education Tax Offset if receiving Family Tax Benefit Part A and student details
- Details of any superannuation contributions for spouse
- HECS/HELP Debt details

Other Information

- Copies of Instalment Activity Statements lodged
- If you have any doubt about any income or expenses you have received or incurred, bring the documents in with you
- Any other information that you think is relevant