



Tax Return Checklist 2015

| Information Required | Information Provided | Not Applicable |
|---|--|--|
| Please provide your bank details for tax refund (if applicable) i.e. BSB, Account No. and Account Name (the ATO has made it mandatory for ALL refunds to be deposited into a bank account. <i>If you don't supply a bank account, then we are unable to complete your return.</i> | <input type="checkbox"/> | <input type="checkbox"/> |
| Income: <ul style="list-style-type: none"> PAYG summaries from employers, Centrelink and/or Superannuation Funds Lump Sum payments (for example Employment Termination Payments) Bank Statements & Term deposits detailing interest earned Income Received from Investments: <ul style="list-style-type: none"> Managed Fund Annual Tax Statement including Capital Gains Statement Dividend Statements including any Buy/Sell contracts for shares Receipt of any shares through an Employer Share Scheme Income Received from Rental Properties: <ul style="list-style-type: none"> Details of Property sold. <i>If you have sold any property please be sure to bring ALL details of the PURCHASE and SALE</i> Annual Statement from Property agent (if engaging the services of an agent) | <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"/> |
| Work-related Deductions <ul style="list-style-type: none"> Details of depreciable assets bought during the year (e.g Laptops) <i>including date purchased and cost.</i> Professional Memberships/ subscriptions/ Union fees Receipts for continuing professional development courses and seminars Receipts for Self Education expenses Receipts or evidence of work related deductions such as protective clothing, uniform expenses and travel expenses Vehicle Log book for motor vehicle expenses <i>if applicable</i> | <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"/> |
| Other deductions : <ul style="list-style-type: none"> Receipts for donations of \$2 and over to registered charities Expenditure incurred in managing tax affairs (e.g tax agents fees) Expenditure incurred in earning investment income (e.g interest paid, subscriptions) Income protection insurance premiums | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |

