

Checklist for Individuals

Income Tax Returns - Documents & Information Required for the period:

1st July 2009 to 30th June 2009

Name: _____

Please attach photocopies of the following documents and tick the appropriate box.

<u>DESCRIPTION</u>	<u>ATTACHED</u>	<u>N/A</u>
• PAYG payment summaries from employment or pensions	<input type="checkbox"/>	<input type="checkbox"/>
• Eligible Termination Payment/(Redundancy) advice	<input type="checkbox"/>	<input type="checkbox"/>
• Interest earned	<input type="checkbox"/>	<input type="checkbox"/>
• Dividends received	<input type="checkbox"/>	<input type="checkbox"/>
• Any money received from Centrelink (Payment Summary)	<input type="checkbox"/>	<input type="checkbox"/>
• Trust or Partnership income or annual tax summary	<input type="checkbox"/>	<input type="checkbox"/>
• Annual statement from private health insurance provider	<input type="checkbox"/>	<input type="checkbox"/>
• Business income and expenses	<input type="checkbox"/>	<input type="checkbox"/>
• Sale of assets e.g. shares, units, property or other investments	<input type="checkbox"/>	<input type="checkbox"/>
• Rental property income, expenses and loan statements	<input type="checkbox"/>	<input type="checkbox"/>
• Work related deductions	<input type="checkbox"/>	<input type="checkbox"/>
- Motor vehicle expenses		
- Self education		
- Travel expenses		
- Uniform/Protective clothing expenses		
- Odometer readings: Vehicle/Rego/Odometer @ 30 June 2009		
- Home office expenses e.g. electricity, contents insurance, telephone		
- Other expenses incurred e.g. union fees, stationery, mobile phone		
• Superannuation contributions you have made (A copy of the letter from the superannuation fund acknowledging that a deduction will be claimed in your personal tax return is required).	<input type="checkbox"/>	<input type="checkbox"/>
• HECS	<input type="checkbox"/>	<input type="checkbox"/>
• Donations: include receipts for donations over \$100	<input type="checkbox"/>	<input type="checkbox"/>
• Purchase of property, shares, other assets	<input type="checkbox"/>	<input type="checkbox"/>

There are also a number of rebates, which you can receive in the form of tax savings or as social security payments. These claims are in relation to:

- | | | |
|--|--------------------------|--------------------------|
| • Working and living in country areas | <input type="checkbox"/> | <input type="checkbox"/> |
|--|--------------------------|--------------------------|

- **Medical expenses** (net after refunds) incurred for yourself or family totalling more than \$1500.00. If you believe you qualify, please bring in your receipts and a summary of those expenses
- **Education Tax Refund** 50% of eligible education expenses up to \$750 for each child in primary school and \$1,500 for each child in secondary school. Please include your receipts.
- **Full name & dates of birth of new dependents**