

# Checklist for Individuals

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

1<sup>st</sup> July 2008 to 30<sup>th</sup> June 2008

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

<u>DESCRIPTION</u>	<u>ATTACHED</u>	<u>N/A</u>
• <b>PAYG payment summaries</b> from employment or pensions	<input type="checkbox"/>	<input type="checkbox"/>
• <b>Eligible Termination Payment/(Redundancy) advice</b>	<input type="checkbox"/>	<input type="checkbox"/>
• <b>Interest earned</b>	<input type="checkbox"/>	<input type="checkbox"/>
• <b>Dividends received</b>	<input type="checkbox"/>	<input type="checkbox"/>
• <b>Any money received from Centrelink</b> (Payment Summary)	<input type="checkbox"/>	<input type="checkbox"/>
• <b>Trust or Partnership</b> income or annual tax summary	<input type="checkbox"/>	<input type="checkbox"/>
• <b>Annual statement from private health insurance provider</b>	<input type="checkbox"/>	<input type="checkbox"/>
• <b>Business income and expenses</b>	<input type="checkbox"/>	<input type="checkbox"/>
• <b>Instalment Activity Statements (IAS)</b>	<input type="checkbox"/>	<input type="checkbox"/>
• <b>Sale of assets</b> e.g. shares, units, property or other investments	<input type="checkbox"/>	<input type="checkbox"/>
• <b>Rental property</b> income, expenses and loan statements	<input type="checkbox"/>	<input type="checkbox"/>
• <b>Work related deductions</b>	<input type="checkbox"/>	<input type="checkbox"/>
- Motor vehicle expenses		
- Self education		
- Travel expenses		
- Uniform/Protective clothing expenses		
- Odometer readings: Vehicle/Rego/Odometer @ 30 June 2008		
- Home office expenses e.g. electricity, contents insurance, telephone		
- Other expenses incurred e.g. union fees, stationery, mobile phone		
• <b>Superannuation contributions</b> 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"/>
• <b>HECS</b>	<input type="checkbox"/>	<input type="checkbox"/>
• <b>Donations:</b> include receipts for donations over \$100	<input type="checkbox"/>	<input type="checkbox"/>
• <b>Purchase of property, shares, other assets</b>	<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:

• <b>Working and living in country areas</b>	<input type="checkbox"/>	<input type="checkbox"/>
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- **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
- **Family Tax Benefits**
- **Full name & dates of birth of new dependents**