

Income Tax Return Preparation Checklist

1. Occupation
2. PAYG Payment Summary(s)
3. Bank Interest Income
4. Dividends
5. Trust distributions & Other Investment Income
6. Partnership income
7. Business/contracting income
8. Rental Property details of income & expenses
9. Spouse - Full name
 - Taxable income, reportable fringe benefits and reportable superannuation contributions
 - Spouse member contributions to super
10. Children – Christian names and dates of birth
 - Child support payments (if any)
11. Work related deductions
 - Car Expenses (log book/details of expenses)
 - Travel Expenses (tolls, interstate travel/accommodation)
 - Uniforms (dry cleaning, washing, replacement)
 - Self-education expenses (fees, books, travelling)
 - Other work related expenses (home office, telephone, sun protection products, professional subscriptions)
12. Interest & Dividend deductions (re 2 to 4 above – bank charges, interest)
13. Gifts or donations
14. Tax Agents Fee
15. Other deductions (Income protection insurance)
16. Personal Superannuation Contributions – Self Employed Persons
17. Private Health Insurance Tax Offset
18. Capital Gains & Losses – details of asset disposals etc.
19. Bank Details (for tax refund)
20. Prior year tax return including any schedules (**new clients only**)

