

## 2017 INDIVIDUAL TAX RETURN CHECKLIST

Here's a checklist to help you prepare the information for your tax return.

### Income

<input type="checkbox"/>	<b>Payment summaries</b> (previously called Group Certificates)
<input type="checkbox"/>	<b>Centrelink statement</b> for Newstart Allowance, Pension payments, Austudy, Youth Allowance, Parenting Payment (Partnered). We do not require details of your Family Tax Benefit Payments
<input type="checkbox"/>	<b>Bank interest</b> Earned
<input type="checkbox"/>	<b>Dividends received</b>
<input type="checkbox"/>	<b>Rental income</b> (refer to separate checklist)
<input type="checkbox"/>	Annual distribution and tax statements for <b>Managed Funds</b>
<input type="checkbox"/>	Purchase & sale details for <b>investments sold</b> including shares. This should include the date of purchase & sale & the cost and sale amounts

### Motor Vehicle Expenses

<input type="checkbox"/>	Do you use your <b>car for work purposes</b> other than travelling directly to and from work? This may include visiting suppliers/customers, picking up materials, attending external training. You can claim using one of 2 methods below.
<input type="checkbox"/>	If you have prepared a <b>log book</b> then provide a copy of the log book along with all running costs for the motor vehicle for the 2016/17 year, ie petrol, registration, insurance, servicing, RAA membership, car wash. Include cost and date the vehicle was purchased.
<input type="checkbox"/>	Alternatively advise the number of <b>kilometres travelled for work</b> for the 2016/17 year - up to a maximum of 5,000 km.

## Other Work-related Expenses

<input type="checkbox"/>	Did you use your <b>mobile phone</b> for work purposes during the 2016/17 year? If yes advise your total phone cost for 2016/17 along with your business use percentage.
<input type="checkbox"/>	Did you undertake any <b>work from home</b> during the 2016/17 year? If yes advise the average number of hours per month that you worked from home.
<input type="checkbox"/>	Did you use your <b>home internet</b> for work purposes? If yes, then advise your total home internet cost for the 2016/17 year along with work use percentage.
<input type="checkbox"/>	Do you wear a <b>compulsory work uniform</b> ? Typically, this would be embroidered with your work details. If yes advise amount spent on these items for 2016/17.
<input type="checkbox"/>	Do you wear <b>protective clothing</b> for work, ie steel capped boots, high vis clothing, safety glasses? If yes advise amount spent on these items for 2016/17.
<input type="checkbox"/>	Do you use any <b>other electronic devices</b> for work – ie computer, iPad. If yes then advise date you purchased the item, cost and work use percentage
<input type="checkbox"/>	Did you undertake any <b>study</b> during the 2016/17 year which has a connection to your work activities? If yes then advise all study expenses incurred during 2016/17 including course fees, books, stationery
<input type="checkbox"/>	<b>Other work-related expenses</b> include Union Fees, Professional Subscriptions, Professional Magazines, Tools

## Other Information

<input type="checkbox"/>	Details of any <b>gifts or donations</b>
<input type="checkbox"/>	Details of <b>income protection insurance</b> paid.
<input type="checkbox"/>	Details of <b>last year's tax return fee</b>
<input type="checkbox"/>	Annual <b>private health</b> fund statement
<input type="checkbox"/>	If you have a <b>partner or spouse</b> – their name, dob and taxable income
<input type="checkbox"/>	<b>Last year's tax return</b> or assessment notice from the ATO. A copy of last year's tax return would be helpful if handy
<input type="checkbox"/>	<b>Any other information</b> you may think is relevant. Each person's circumstances are unique