



YOUR PARTNER IN BUSINESS

2014 individual tax Return Checklist

EXPENSES	YES	NO
Work Related Car Expenses - Do you use your vehicle for work purposes (other than driving to and from work)? <ul style="list-style-type: none"> - Number of KM's you travel for work purposes; or - Log book business % and running costs of the car. 	<input type="checkbox"/>	<input type="checkbox"/>
Work related travel <ul style="list-style-type: none"> - Details of any out of pocket costs for travel specifically related to your work. 	<input type="checkbox"/>	<input type="checkbox"/>
Work Related Uniform <ul style="list-style-type: none"> - Do you wear a specific uniform or protective clothing, solely for work? - Detail and purchases. 	<input type="checkbox"/>	<input type="checkbox"/>
Self Education Expenses <ul style="list-style-type: none"> - Details of education expenses which relate directly to your current occupation. 	<input type="checkbox"/>	<input type="checkbox"/>
Other work related expenses <ul style="list-style-type: none"> - Items include stationery, internet, phone, materials, etc. Break down the business % of things such as telephone or internet. 	<input type="checkbox"/>	<input type="checkbox"/>
Gifts or Donations <ul style="list-style-type: none"> - Gifts over \$2 to a Deductible Gift Recipient are deductible provided you have a receipt stating this. 	<input type="checkbox"/>	<input type="checkbox"/>
Personal Superannuation Contributions <ul style="list-style-type: none"> - Copy of s 290 election sent to the Super Fund advising of the contribution amount. 	<input type="checkbox"/>	<input type="checkbox"/>
Income Protection Insurance <ul style="list-style-type: none"> - Policy showing amount paid 	<input type="checkbox"/>	<input type="checkbox"/>
OFFSETS	YES	NO
Private Health Insurance <ul style="list-style-type: none"> - Please provide annual statement from Private Health Insurer 	<input type="checkbox"/>	<input type="checkbox"/>
Medical Expense Offset (Only available to persons who received the offset in their 2012-13 tax assessment OR expenses related to disability aids, attendant care or aged care expenses) <ul style="list-style-type: none"> - Copy of your receipts and statements for your medical expenses; you can request annual statements through Medicare or your Private health insurer - For details on what you are eligible to claim please call our office 	<input type="checkbox"/>	<input type="checkbox"/>
OTHER	YES	NO
EFT Details – for electronic payment of refunds	<input type="checkbox"/>	<input type="checkbox"/>

INCOME	YES	NO
Salary and Wages - PAYG Payment Summary	<input type="checkbox"/>	<input type="checkbox"/>
Employer Termination Payment - ETP Payment Summary	<input type="checkbox"/>	<input type="checkbox"/>
Government Allowances (Age Pension, Newstart, Youth Allowance, Parenting Payments, etc) - Payment Summary from Centrelink	<input type="checkbox"/>	<input type="checkbox"/>
Interest Income - Bank statements showing interest income for the full year	<input type="checkbox"/>	<input type="checkbox"/>
Dividends - Dividend Statements (must be based on date paid, not declared) - Any costs relating to the purchase of those shares (e.g. margin loan interest costs) - Or, provide HIN identification (on dividend statement)	<input type="checkbox"/>	<input type="checkbox"/>
Employee Share Schemes - Employee Share Scheme Statement from Employer	<input type="checkbox"/>	<input type="checkbox"/>
Partnership and Trust Income - Year-end Tax statements (usually issued in August/September) - Any costs relating to the purchase of those shares (e.g. margin loan interest costs)	<input type="checkbox"/>	<input type="checkbox"/>
Capital Gains – Both Purchase AND Sale documents (ie dates, cost, quantity) - Any Assets sold during the year (based on contract date, not settlement date) including <ul style="list-style-type: none"> ○ Real Estate (if main residence please advise if it has been rented at some stage through ownership and provide details of this) ○ Shares in a company ○ Units in a Unit Trust ○ Collectable Artwork 	<input type="checkbox"/>	<input type="checkbox"/>
Foreign Income - Details of any foreign sourced income or interest	<input type="checkbox"/>	<input type="checkbox"/>
Rent - Agent Statements (if rented through agent) ie, annual summary - Details of income (if not rented through agent) - Expenses (including: Advertising, Body Corp fees, Cleaning, Council Rates, Insurance, Interest on loan, Land Tax, Agent Fees, Water rates and any other expenses) - Detailed breakdown of repairs and any assets purchased	<input type="checkbox"/>	<input type="checkbox"/>
Managed Investment Schemes - Statements from manager of the scheme. (Year end statement) - Expenses relating to these investments, including management fees, interest on borrowings, etc.	<input type="checkbox"/>	<input type="checkbox"/>

The best compliment you can pay our business is to refer your family and friends to us.

Address: Level 2, 971 Burke Road, Camberwell Vic 3124

Phone: 03 9830 1555

Fax: 03 9836 2884

