

2007 INDIVIDUAL TAX RETURN CHECKLIST

NOTE: please supply BSB and Bank Account number for refund to be deposited

INCOME

- Employment income
- Centrelink/Youth allowance/Pension income
- Dividends/Investments
- Interest
- Other income e.g. subcontracting, foreign income
- Termination Payments
- Rental Income
- Sale of any assets

WHAT TO BRING

- Group Certificates (PAYG Payment Summaries)
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- Dividend statements
- Passbooks, bank or summary statements
- Supply details, receipt book, banking summary
- Tax statements
- PAYG Payment summaries, statements of termination
- Real Estate summary, Yearly bank summary
- Buy & Sell contracts and additional holding costs

DEDUCTIONS

- Union Fees/Professional Associations
- Tools of Trade/Repairs
- Trade Journals/Seminars
- Work Clothes/Dry-cleaning/Laundry
- Gifts/Donations over \$2
- Sickness & Accident Policies
- Self-education Expenses
- Motor Vehicle Expenses



- Travelling & Accommodation
- Home Office Expenses
- Sun Protection Expenses
- Other

WHAT TO BRING

- Invoices, Receipts
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- Receipts
- Policy details, amounts paid
- Course details, Receipts
- Log book or diary records of business kms travelled, receipts for fuel, rego/insurance, repairs, lease/loan payments, engine size
- Invoices, Receipts, Purpose of trips
- Telephone, Electricity accounts, Computer expenses
- Receipts & docketts for all other expenses
- Please bring receipts to interview

TAX OFFSETS

- Sole Parent (if widowed, divorced or separated)
- Spouse
- Superannuation
- Medical
- Health Fund
- Child Care expenses

WHAT TO BRING

- Details of children in your care, ie name, date of birth and any income earned
- In periods of no care for children, provide details of their income
- Name of fund, Policy Number, contribution amount personally or on behalf of a spouse
- Details of medical expenses paid & amounts reimbursed by Medicare or Private Health Fund if over \$1,500
- Statement from the Health Fund detailing coverage and rebate entitlement (if any)
- Receipts and Letter from family assistance office

OTHER ITEMS

- HECS/ Supplement Loan Scheme liability

WHAT TO BRING

- HECS/Supplement Loan Scheme statements

Please note that this list is not exhaustive and other deductions and entitlements may be available.
If you are unsure please ask at the time of your interview.

NOTE: RECEIPTS FOR EXPENSES ARE NECESSARY TO CLAIM A TAX DEDUCTION AND NEED TO BE RETAINED FOR 5 YEARS IN CASE OF A TAX AUDIT.