

2011 INCOME TAX RETURN CHECKLIST

All information provided should be for the period of 1st July 2010 to 30th June 2011

INCOME

- PAYG Payment Summaries from each employer
- PAYG Payment Summaries from Centrelink
- Lump Sum and Termination payments Summaries
- Superannuation payment summaries
- Any interest earned on any bank accounts
- Foreign / Partnership / Business / Other Income details

DEDUCTIONS

- Receipts for work related expenses or a summary of those expenses
- Work related kilometers travelled where total is less than 5,000kms
- Motor vehicle expenses log book where travel is more than 5,000kms
 - Log Book
 - Odometer reading as at 30th June 2011
 - Motor vehicle expenses
 - Motor vehicle purchase and finance agreements (if new car purchased during the year) and any sale details of previous vehicles
- Self education expenses in excess of \$250 including related travel
- Receipts for donations
- HELP / SFSS Debt details and ATO schedules

INVESTMENTS

- Dividend Statements
- Trust distribution tax statements
- Tax statements from Managed Funds
- Details of shares and investments purchased or sold
- Employee option or share scheme documents
- Investment expenses including borrowing costs, interest on loans, advice fees etc.
- Rental Income reports and expense details
- Any capital gains / loss details e.g. share & property sales and or purchases

MEDICAL

- Private health insurance details incl. membership number & level of cover
- Medical expenses (if more than \$1500-)
- Any Medicare levy exemption details

OTHER

- Last years tax return (if you are a new client)
- Spouse Income details
- Number of dependants and date of births (if you are a new client)
- Education expenses for all primary and secondary school children if eligible for Education Tax Offset
- Income protection insurance details
- Your BSB and account number if you wish for your return to be deposited into your nominated account.