

For your convenience a list of information required to complete your individual income tax return is provided below. Prior to forwarding you tax information to me, please go through the list and check you have all the applicable information ready to complete your return. If required print the checklist and send it in with the supporting documents and other information. If you answer yes to any of the following questions, please provide details and supporting documents.

Income

Have any of your personal details changed since your last tax return?
If any of the following have changed fill in the details below.

Name: _____

Address: _____

E-mail: _____

Phone Number: _____

Marital Status: _____

Spouse's Name: _____

Spouse's D.O.B: _____

If married throughout year, date of marriage: _____

Details of Dependants (including their names and date of birth) _____

Employment Income

If any of the following apply to you provide all applicable information for money received.

PAYG Payment Summary (group certificate) from each place of employment of the year.
How many are attached? _____

Eligible Termination Payments (ETPs) _____

Any bonuses, director's fees, commissions, tips, living away from home allowances,
Centrelink or government payments _____

Did you receive any pension and/or annuity payments throughout the year? _____

Did you receive any Australian Superannuation
lump sum payments throughout the year? _____

Did you receive any interest payments throughout they year?
(This includes from bank accounts and term deposits) _____

Did you receive any dividends throughout the year? If Yes please provide the following:

- Dividend statements received from the companies.
- Did you receive any bonus issues of shares throughout the year? _____
- Did you receive any payments from partnerships and trusts? _____
(These can be from public or private trusts)
- If a public trust please provide an annual statement.
- For all other trusts and partnerships provide documents stating income you have received.

Do you run your own business? If yes, provide information and documentation on all income and expenses from this business.

Are you a sole trader whose income comes predominately (80% or more) from the one source? _____

Do you have any net farm management deposits or withdrawals? _____

Did you incur any capital gains or losses throughout the year? (i.e. did you sell any shares, properties other than your main residence, investments, etc) If Yes:

- When was the asset bought? _____
- How much did it cost? _____
- How many were bought? (for shares, unit trusts etc) _____
- For shares, were any bonus/right issues, capital returns etc received during your ownership of these shares? _____
- When was the asset sold? _____
- How much did it sell for? _____
- How many were sold? (for shares, unit trusts etc) _____

Did you receive any foreign source income and foreign assets or property? If Yes:

- Which country did these originate from? _____
- Was any foreign tax withheld? _____

Did you receive any rent or own a rental property throughout the year? If yes you can send in copies of rental statements and any additional income or expenditure not recorded on these, or provide the following information with supporting documents:

- When in the year was the property rented? _____
- What was the rental income earned? _____
- Was any interest charged on money owed on the rental property? _____
- Was there any expenditure on the rental property? _____
- If so what was it and for how much? _____

- Were there any capital works expenditure incurred throughout the year? _____
- Were you part of any Forestry managed investment scheme? If yes, what income did you receive or expenditure incurred as a result? _____

Deductions

Did you incur any work related expenses regarding:

- Motor vehicles. Provide details _____
- Travel expenses. Provide details _____
- Uniform, occupation specific, protective clothing, laundry and dry cleaning expenses.
Provide details _____
- Self-education expenses. Provide details _____
- Other Work Related. E.g. union fees, subscriptions, memberships, seminars, overtime meals, home office expenses, brief case, assets <\$300 _____
- If asset is >\$300, still provide information as may be able to be depreciated _____

Did you incur any interest or dividend expenses? This can only occur if have income from interest and dividends. These expenses include interest on loans to buy equities/shares.

Did you make any donations throughout the year? If yes, provide details _____

Did you incur any expenses for managing tax affairs? _____

Did you make any personal contributions to your superannuation? If yes:

- What is the date of payment? _____
- How much was the payment? _____
- Other _____

Did you incur any medical expenses throughout the year? _____

Please provide details of all out of pocket medical expenses incurred throughout the year by you and your dependents. _____

Do you belong to a health fund? If Yes:

- Name of Health Fund _____
- Membership Number _____
- Number of days in the fund for the year _____
- If available, provide the annual statement from the fund