**INFORMATION REQUIRED**

**Individual Tax Return Check List**

Please ensure you bring the following information **(if applicable to you)** to assist us in preparing your income tax return. Please check the following and bring along your PAYG Payment Summaries, Statements, Accounts, Receipts etc, to help us prepare the return.

**Income / Receipts**

* Government pensions and allowances
* Payment summaries for salary and wages
* Lump sum and termination payments
* Other pensions and/or annuities
* Allowances (e.g. Entertainment, car etc.)
* Interest, rent and dividends
* Distributions from partnerships or trusts
* Annual tax statements for managed funds
* Details of any assets sold that were either used for income earning purposes or may be caught for capital gains tax.

**Check list of other possible deductions you may be entitled to:**

* Award transport allowance claims
* Bank and government charges on deposits of income, and deductible expenditure
* Car parking (when travelling on business)
* Conventions, conferences and seminars
* Depreciation of library, tools, business equipment, including portion of home computer
* Gifts or donations
* Home office running expenses
-Cleaning
-Cooling
-Heating
-Lighting
-Telephone
* Interest and dividend deductions
-Account keeping fees
-Ongoing management fees
-Interest on borrowings to acquire shares
-Advice relating to changing investment (but not setting them up)
* Interest on loans on equipment or income earning investments
* Motor vehicle expenses (business)
* Overtime meal allowances
* Protective/Industry clothing expenses
* Rental property expenses – including
-Advertising expenses
-Council/water rates
-Insurance
-Interest
-Land tax
-Legal expenses/management fees
-Repairs and maintenance
-Telephone expenses
-Travelling to inspect property
* Superannuation contribution by sole traders/substantially unsupported taxpayers
* Tax agent fees
* Telephone expenses (business)
* Tools of trade

**Check list of other information required:**

* Private health insurance details – annual tax statement
* Spouse details and approximate taxable income
* BSB and Account details for EFT of refund