

Individual Tax Return Preparation - Checklist

Please bring to your appointment copies / originals of the following information for each individual in your family group. **Not all of these may apply to you.**

Electronic Funds Transfer (EFT)

The ATO will no longer be issuing refund cheques, please bring along bank details for the account you wish to have any refund credited to below:

Income

- Payment Summaries for any work performed
- Details on allowances, directors fees etc.
- Dividend information (copies of dividend slips)
- Managed funds (copies of Annual Tax Statements)
- Interest received on personal bank accounts (copies of statements)
- Any other income received

Deductions

- Work related expenses (copies of receipts)
e.g., Telephone, Internet, Tools, Stationery, Uniform, Memberships, etc.
- Work related car expenses (see motor vehicle section on page 2)
- Advise any additions to your depreciation schedule as well as any assets sold, scrapped or no longer used
- Estimate of hours worked in Home Office/Study
- "Intention to claim deduction" form for Superannuation Contributions (Sec 290-170 form)
- Donations (copies of receipts)
- Self education expenses (copies of receipts)
- Income Protection Insurance premiums

Investments

- Details of shares, units or other financial investments purchased and sold during the year
- Details of other assets purchased and sold during the year

Rental Properties

- Income details or property agent statements
- Details on loans, showing interest on rental property
- Expenses relating to rental property
- Quantity Surveyors tax depreciation report (if applicable)
- Period of rental for the financial year
- If purchased or sold during the financial year, copies of the settlement statement, contract and finance documents

Private Health Insurance & Medical Expenses

- Copy of your Annual Private Health Insurance statement as issued by your provider

Other

- Details of dependents including full names and dates of birth
- Provide a summary of expenses (net of any refunds) for disability aids, attendant care or aged care for you, your spouse or a dependent
Note: the medical expenses tax offset is no longer available for the majority of taxpayers, please do not provide medical expense information unless you have out of pocket medical expenses relating to disability aids, attendant care or aged care expenses.
- Details of any Child Support payments paid/received
- Any other information you consider relevant

Motor Vehicles

If your business/work-related motor vehicle travel **was 5,000km or less** for the year, you may claim your deduction using the 'cents per kilometre' method.

Please provide the following details for each car used:

<i>Car Details</i> <i>Eg. Registration No</i>	<i>Odometer Reading</i>		<i>Total kilometres travelled</i> <i>2017/2018</i>
	<i>01/07/2017</i>	<i>30/06/2018</i>	

Alternatively, you may claim your deduction using the 'log book' method. Please provide a copy of your log book and details of the following expenditure for each car:

- Fuel
- Insurance
- Car Wash
- Registration
- Repairs & Maintenance
- Tolls
- Finance Costs (eg. Loan statements /Finance Documents)

Note: Log books must be completed at least every 5 years or if there are any changes to your circumstances.