2014 INCOME TAX RETURN CHECKLIST

Before coming to your interview this year please take the time to look over the list below of information which you may need to bring to your appointment.

Tick if applicable and bring to appointment:

Income:

- ☐ PAYG summaries (group certificates)
- ☐ Centrelink year end summary statement – newstart allowance, youth allowance, parenting payment, sickness payment or pension
- ☐ Interest received
- ☐ Dividends from shares / investments held (*including any dividends which have been reinvested*)
- ☐ Trust and investment distributions (*please ensure you have the "Taxation Statement" provided by the fund – some of these will not be provided until Aug/Sept)*
- ☐ Rental income received
- ☐ Lump sum and termination payments *(provide all documents including an ETP payment summary from the employer or fund)*
- ☐ Foreign source income and details of any tax credits *(employment and pension)*

Expenses:

- ☐ Motor vehicle travel (*details of the kilometres travelled for the cents per kilometre or log book method, or details of all motor vehicle expenses for the alternative methods*)
- ☐ Other travel costs (*parking fees, City Link etc*)
- ☐ Clothing / uniform purchases, cleaning and sun protection costs
- ☐ Donations of $2 and over
- ☐ Income protection insurance
- ☐ Self-education expenses (*this may include costs such as: course fees, union fees, printing and stationary, parking, transport fees, journals and publications, books, internet, repairs to equipment and motor vehicle travel*)
- ☐ Any other work related expenses (*this may include costs such as: union fees, telephone / mobile phone, tools and equipment, home office, internet, printing and stationary, journals and publications, conferences and seminars, subscriptions, professional memberships and practising certificates*)
- ☐ Rental property expenses (*this may include costs such as: advertising, body corporate fees, cleaning, council rates, gardening, insurance, interest on loans, legal fees, pest control, agent fees and commissions, repairs and maintenance, stationary and postage, travel inspections, water charges and bank fees*)

Other:

- ☐ Private health insurance statement
- ☐ Medical expenses details (*where the total paid net of your fund rebates is more than $2,120*)
- ☐ HELP debt statement (formally HECS)
- ☐ Spouse details (*if applicable – name, date of birth and taxable income for the year*)
- ☐ Capital gains details for real estate, shares, managed funds and other investment acquisitions or disposals (*purchase cost and date as well as sale price and date for disposals*)
- ☐ Personal superannuation contributions letter for your spouse or yourself (*if you are claiming as a tax deduction*)
- ☐ Medicare exemption certificate