

## Personal Tax Return Checklist 2017

Name: \_\_\_\_\_

This checklist will assist you in supplying the records and information needed to complete your tax return for 2017.

### INCOME

- Payment summaries
- Superannuation lump sums
- ETP payment summaries
- Government pensions and allowance payment summaries
- Interest received or reinvested
- Dividends received or reinvested
- Partnership/trust income
- Managed funds statements
- Employee Share Scheme details
- Business income and expenses and GST information (if applicable)
- Rental property income and expenses including real estate agents annual statement, interest paid on loan and a summary of any other expenses paid by yourself
- Capital Gains Tax information (eg. shares, investment property, vacant land)
- Any other income including foreign source income

### DEDUCTIONS

- Last year's tax return
- Gifts/donations
- Self-education – relevant to your occupation
- Seminars
- Tools and equipment
- Uniforms
- Work related travel
- Telephone

- Subscriptions
- Union fees
- Income protection
- Work related car expenses – please provide log book
- Super contributions letter from fund if claiming as a deduction
- Any other deductions

**Note: if your total work-related deductions exceed \$300.00, you must have receipts**

### TAX OFFSETS

- Private Health Insurance statement

### OTHER INFORMATION TO PROVIDE

- PAYG tax instalments
- Taxable Payments Annual Report – Building and Construction Industry
- Spouse's taxable income (if not being prepared by us)
- Tax-free Government pensions received and any Child Support payments made by you
- Up-to-date contact details
- Bank account details for refund