

## 2011 Individual Tax Return Checklist

Name of taxpayer: \_\_\_\_\_

Address: \_\_\_\_\_

Preferred Contact No: \_\_\_\_\_

Information	Information Provided	Not Applicable
<b>Income</b>		
PAYG summaries eg from employers, Centrelink and/or superannuation funds	<input type="checkbox"/>	<input type="checkbox"/>
Lump sum payments (eg Employment Termination Payment)	<input type="checkbox"/>	<input type="checkbox"/>
Trust distribution statement, including copy of the trust's tax return	<input type="checkbox"/>	<input type="checkbox"/>
Managed fund annual tax statement and capital gains tax statement	<input type="checkbox"/>	<input type="checkbox"/>
Partnership distribution statement, including a copy of the partnership's tax return	<input type="checkbox"/>	<input type="checkbox"/>
Dividend statements	<input type="checkbox"/>	<input type="checkbox"/>
Bank statements stating interest earned	<input type="checkbox"/>	<input type="checkbox"/>
Term deposit statements stating interest earned	<input type="checkbox"/>	<input type="checkbox"/>
Buy/sell contract notes for shares (if any shares were sold)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Work-related Deductions</b>		
Details of depreciable assets bought during the year (eg laptops)	<input type="checkbox"/>	<input type="checkbox"/>
Professional journals / magazines	<input type="checkbox"/>	<input type="checkbox"/>
Professional memberships / subscriptions	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for continuing professional development courses and seminars	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for self-education expenses	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for other work related deductions such as protective clothing, uniform expenses and travel	<input type="checkbox"/>	<input type="checkbox"/>
Vehicle logbook for motor vehicle expenses (if using the logbook method)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Other Deductions</b>		
Receipts for donations of \$2 and over to registered charities	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in managing tax affairs (eg tax agent's fees)	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in earning investment income	<input type="checkbox"/>	<input type="checkbox"/>
Income protection insurance premiums	<input type="checkbox"/>	<input type="checkbox"/>
<b>Rental Properties</b>		
Annual statement from property agent (if engaging the services of an agent)	<input type="checkbox"/>	<input type="checkbox"/>
Date when property was purchased	<input type="checkbox"/>	<input type="checkbox"/>
Details of depreciable assets bought or disposed during the year	<input type="checkbox"/>	<input type="checkbox"/>

