

Tax return checklist for Individuals and Sole Traders / 2008

2008 Individual Tax Return

Name of Taxpayer: _____

Address: _____

Preferred Contact No: _____

Information Required	Information Provided	Not Applicable
Income	<input type="checkbox"/>	<input type="checkbox"/>
PAYG summaries from employers, Centrelink and/or superannuation funds	<input type="checkbox"/>	<input type="checkbox"/>
Lump sum payments (for example, 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 detailing interest earned	<input type="checkbox"/>	<input type="checkbox"/>
Term deposit statements detailing 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"/>
Work-related Deductions	<input type="checkbox"/>	<input type="checkbox"/>
Details of depreciable assets bought during the year (for example, 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 if related to employment	<input type="checkbox"/>	<input type="checkbox"/>
Receipts or evidence of work-related deductions, such as protective clothing, uniform expenses and travel expenses	<input type="checkbox"/>	<input type="checkbox"/>
Vehicle log book for motor vehicle expenses	<input type="checkbox"/>	<input type="checkbox"/>
Other Deductions	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for donations of \$2 and over to registered charities	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in managing tax affairs (for example, tax agent's fees)	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in earning investment income (for example, brokerage fees)	<input type="checkbox"/>	<input type="checkbox"/>
Income protection insurance premiums	<input type="checkbox"/>	<input type="checkbox"/>

Information Required	Information Provided	Not Applicable
Rental Property	<input type="checkbox"/>	<input type="checkbox"/>
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 scrapped during the year	<input type="checkbox"/>	<input type="checkbox"/>
Expenses incurred which are not detailed on the property agent annual statement, such as water charges, land taxes and insurance premiums	<input type="checkbox"/>	<input type="checkbox"/>
If property is held by more than one individual, please provide details of owners and their legal ownership percentage	<input type="checkbox"/>	<input type="checkbox"/>
If property was disposed off during the income year, information relating to dates and costs associated with the acquisition and disposal of the property	<input type="checkbox"/>	<input type="checkbox"/>
Loan statements for property, showing interest paid for the income year	<input type="checkbox"/>	<input type="checkbox"/>
Period property was rented out during the income year	<input type="checkbox"/>	<input type="checkbox"/>
Records detailing rental income (if not engaging the services of an agent)	<input type="checkbox"/>	<input type="checkbox"/>
Records of expenses relating to the property (if not engaging the services of an agent)	<input type="checkbox"/>	<input type="checkbox"/>
Offsets / Rebates	<input type="checkbox"/>	<input type="checkbox"/>
Details of any superannuation contributions for spouse	<input type="checkbox"/>	<input type="checkbox"/>
Details of dependants, including their age, occupation and income	<input type="checkbox"/>	<input type="checkbox"/>
Details of medical expenses where the total exceeds \$1,500 (after Medicare and private health fund rebates)	<input type="checkbox"/>	<input type="checkbox"/>
Private health insurance statement (if insurance is held with your partner, please state who is the primary holder and provide the age of your partner)	<input type="checkbox"/>	<input type="checkbox"/>
If Operating as a Sole Trader	<input type="checkbox"/>	<input type="checkbox"/>
Cashbook, which includes records of drawings taken before the business takings are banked	<input type="checkbox"/>	<input type="checkbox"/>
Copies of BASs lodged	<input type="checkbox"/>	<input type="checkbox"/>
Copies of PAYG summaries for employees	<input type="checkbox"/>	<input type="checkbox"/>
Details of any Government grants, rebates or payments received	<input type="checkbox"/>	<input type="checkbox"/>
Details of superannuation contributions for employees	<input type="checkbox"/>	<input type="checkbox"/>
Payments of salaries and superannuation to associates	<input type="checkbox"/>	<input type="checkbox"/>
Records from accounting software (for examples, trial balance, P&L and balance sheet)	<input type="checkbox"/>	<input type="checkbox"/>
Statements of all liabilities of the business	<input type="checkbox"/>	<input type="checkbox"/>
Superannuation contributions for self-employed persons	<input type="checkbox"/>	<input type="checkbox"/>

Information Required	Information Provided	Not Applicable
Other Information	<input type="checkbox"/>	<input type="checkbox"/>
Copies of IASs lodged	<input type="checkbox"/>	<input type="checkbox"/>
If you have any doubt about any income or expenses you've received or incurred, bring the documents with you	<input type="checkbox"/>	<input type="checkbox"/>
Any other information that you think is relevant	<input type="checkbox"/>	<input type="checkbox"/>