

2009 Individual Tax Return Checklist

Name of taxpayer: _____

Address: _____

Preferred Contact No: _____

| Information | Information Provided | Not Applicable |
|---|--------------------------|--------------------------|
| Income | | |
| PAYG summaries 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 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 | | |
| 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 or evidence of 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"/> |
| Other Deductions | | |
| 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"/> |
| Rental Properties | | |
| Annual statement from property agent (if engaging the services of an agent) | <input type="checkbox"/> | <input type="checkbox"/> |
| Date of 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"/> |
| Expenses (which are not detailed on the property agent annual statement) incurred, such as water charges, land tax and insurance premiums | <input type="checkbox"/> | <input type="checkbox"/> |

