

2009 Individual Tax Return Checklist

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Income	Deductions	Other
<ul style="list-style-type: none"> ▪ PAYG Payment Summaries (Group Certificates), Allowances, Benefits, Earnings, Tips and Directors' Fees ▪ Government or Centrelink Payments including Pensions, Sickness Benefits, Parenting Payments, Newstart, Austudy and Youth Allowances ▪ Interest Received from Savings (Term Deposits, Cash Management Trusts, Bonus Saver Account, etc) ▪ Dividends received on Shares and Managed Fund Statements ▪ Pension or Annuity Payment Summaries (Group Certificates) ▪ Foreign Source Employment and Pension Income and Foreign Tax Credits ▪ Lump Sum and Termination Payments - All documentation should be provided including an ETP Payment Summary from the Employer or Fund ▪ Details of any Capital Gains Tax Asset Sales (eg. Shares and Real Estate). Please include dates of, and costs associated with, Acquisition and Disposal. (You can save tax if you qualify for a variety of CGT Concessions) ▪ Income from Trusts and Partnerships (Distribution Statements) ▪ Rental Property Income (refer to the Rental Property Checklist on our Website) ▪ Any Other Income 	<ul style="list-style-type: none"> ▪ Work related Travel and Motor Vehicle Expenses (Business kilometres, Logbook) ▪ Work related Protective Clothing and Uniform Expenses ▪ Work related Self Education Expenses (eg. Course fees, Seminars, Conferences, Books, Stationery and Travel to the Course) ▪ Subscriptions (Union Membership, Professional Body Membership, Licensing) ▪ Donations of \$2 and over (School Building Fund Donations, Library Trust) ▪ Tax Agent's Fees ▪ Interest and Dividend Expenses (Bank fees, Margin Loan Interest, Investment Magazine Subscription, Financial Planning Fees) ▪ Income Protection Insurance Policy (Sickness and Accident, Income Continuance) ▪ Sun Protection expenses (if mainly working outdoors - Sunscreen, Sunglasses, Hat) ▪ Tools & Equipment, New Assets (eg. Computer, Personal Organiser, Laptop Lease) ▪ Work related Mobile Phone & Internet Expenses ▪ Printing and Stationery Expenses (eg. Work Diary) ▪ Number of Nights Living Away From Home for Work ▪ Any other work related Expenses 	<ul style="list-style-type: none"> ▪ Private Hospital Insurance Statement ▪ Dependant Children details (full name, date of birth, taxable income if working) ▪ Spouse Taxable Income ▪ Net Family Medical Expenses if they exceed \$1,500 in Total (eg. Doctors, Dental, Hospital, Optical, Pharmacy) ▪ Dependent Childrens Education Expenses for Education Tax Refund (eg. Internet, Computer, Laptop, Printer, Software, School Books, Stationery) ▪ Medicare Card ▪ HECS, HELP, SFSS and PELS Debt Statement ▪ DVA Pension & Defence Force Medicare Levy Exemption Certificate <div style="text-align: center; margin: 20px 0;">  </div> <ul style="list-style-type: none"> ▪ Recent Home Loan Statement ▪ Superannuation Fund Statements ▪ Life Insurance Policy

Note: To ensure you obtain the maximum deductions you are entitled to, and in consideration of the penalty provisions, full details of any claim should be provided and supporting documentation made available, including receipts, tax invoices, dockets, logbooks, diary notations or reasonable and supporting estimates.