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**INCOME**

* **Payment Summaries (Group Certificates)**
* **Eligible Termination Payments (ETP)**
* **Centrelink Payment summary** (ie: Newstart, Parenting Payments, Austudy etc.)
* **Other Pension or Annuity Payment Summaries** (ie: Comsuper, Age Pension)
* **Gross Interest** – Received on all Bank Accounts for the financial year
* **All Dividend Slips for payments received during the financial year**
* **Annual Taxation Summary for all Managed Investments**
* **Child Maintenance Received or Paid**
* **Capital Gains Tax Information**
* Date of Asset Purchase
* Cost of Asset Purchase (including Stamp Duty/Legal Fees/Reno’s)
* Date of Asset Sale (Contract Date)
* Sale Price of Asset (Including all Selling Costs ie: Commission, Legals etc)
* **Please Provide Settlement Statements or Buy/Sell Contracts for the Above**
* **Rental Properties (see Rental Properties Checklist)**
* **Superannuation Contributions on Behalf of your Spouse**
* **Other**
* Private Health Insurance Annual Taxation Statement

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**DEDUCTIONS**

* **Motor Vehicle Expenses** (For Work Related Travel excluding Home to Work)
* Type / Model / Registration of Vehicle
* Number of Business Km’s Travelled
* Purchase details of Vehicle (Date and Cost)
* Completed Log Book
* Registration/Insurance/Fuel/Repairs & Maintenance
* Explanation of requirement to use the Vehicle for Work (ie: visit client premises, carry bulky tools without on-site lockup etc.)
* **Work Related Travel Expenses** (Overnight Business Trips)
* Accommodation / Meals / Incidentals / Car Hire etc
* **Work Related Uniforms** (Company Logo or Protective Clothing)
* Cost of Uniforms or Protective Clothing
* **Self-Education Expenses**
* Cost of Text Books / Student Union Fees / Course Fees / Stationery etc.
* **Other Work Related Expenses**
* Union Dues / Professional Memberships / Telephone / Subscriptions / Tools / Assets Costing <$300 / Stationery / Internet (with Work Related %)
* **Interest, Dividend & Investment Expenses**
* Margin Loan Interest & Charges
* Portfolio Management Fees (Financial Planner annual Fees)
* Bank Charges on Savings Accounts
* **Gifts & Donations**
* No Tangible Benefit can be obtained from the donation and it must be made to an Australian Taxation Office endorsed Gift recipient
* **Cost of Managing Tax Affairs**
* Last Year’s Accountants Bill for preparation of Taxation obligations
* Km’s Travelled to Complete Last Year’s Tax Return
* **Other Expenses**
* Income Protection / Sickness & Accident Insurance premium paid
* The Purchase details for Assets >$300 (ie: Computers / Large Tools etc.)
* **Spouse Details**
* Full Name / Date of Birth / TFN
* Taxable Income
* Reportable Fringe Benefits / Superannuation
* Pensions & Allowances / Trust Income / Investment Losses
* Child Support Paid