

INCOME	
* Payment Summaries (Group Certificates)	<input type="checkbox"/> Check Box
* Eligible Termination Payments (ETP)	<input type="checkbox"/> Check Box
* Centrelink Payment summary (ie: Newstart, Parenting Payments, Austudy etc.)	<input type="checkbox"/> Check Box
* Other Pension or Annuity Payment Summaries (ie: Comsuper, Age Pension)	<input type="checkbox"/> Check Box
* Gross Interest – Received on all Bank Accounts for the financial year	<input type="checkbox"/> Check Box
* All Dividend Slips for payments received during the financial year	<input type="checkbox"/> Check Box
* Annual Taxation Summary for all Managed Investments	
* Child Maintenance Received or Paid	<input type="checkbox"/> Check Box
* Capital Gains Tax Information	<input type="checkbox"/> Check Box
* Date of Asset Purchase	<input type="checkbox"/> Check Box
* 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	<input type="checkbox"/> Check Box
* Rental Properties (see Rental Properties Checklist)	<input type="checkbox"/> Check Box
* Superannuation Contributions on Behalf of your Spouse	
* Other	<input type="checkbox"/> Check Box
* Private Health Insurance Annual Taxation Statement	<input type="checkbox"/> Check Box

DEDUCTIONS	
<p>* Motor Vehicle Expenses (For Work Related Travel excluding Home to Work)</p> <ul style="list-style-type: none"> * 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.) 	<input type="checkbox"/> Check Box
<p>* Work Related Travel Expenses (Overnight Business Trips)</p> <ul style="list-style-type: none"> * Accommodation / Meals / Incidentals / Car Hire etc 	<input type="checkbox"/> Check Box
<p>* Work Related Uniforms (Company Logo or Protective Clothing)</p> <ul style="list-style-type: none"> * Cost of Uniforms or Protective Clothing 	<input type="checkbox"/> Check Box
<p>* Self-Education Expenses</p> <ul style="list-style-type: none"> * Cost of Text Books / Student Union Fees / Course Fees / Stationery etc. 	<input type="checkbox"/> Check Box
<p>* Other Work Related Expenses</p> <ul style="list-style-type: none"> * Union Dues / Professional Memberships / Telephone / Subscriptions / Tools / Assets Costing <\$300 / Stationery / Internet (with Work Related %) 	<input type="checkbox"/> Check Box
<p>* Interest, Dividend & Investment Expenses</p> <ul style="list-style-type: none"> * Margin Loan Interest & Charges * Portfolio Management Fees (Financial Planner annual Fees) * Bank Charges on Savings Accounts 	<input type="checkbox"/> Check Box
<p>* Gifts & Donations</p> <ul style="list-style-type: none"> * No Tangible Benefit can be obtained from the donation and it must be made to an Australian Taxation Office endorsed Gift recipient 	<input type="checkbox"/> Check Box
<p>* Cost of Managing Tax Affairs</p> <ul style="list-style-type: none"> * Last Year's Accountants Bill for preparation of Taxation obligations * Km's Travelled to Complete Last Year's Tax Return 	<input type="checkbox"/> Check Box
<p>* Other Expenses</p> <ul style="list-style-type: none"> * Income Protection / Sickness & Accident Insurance premium paid * The Purchase details for Assets >\$300 (ie: Computers / Large Tools etc.) 	<input type="checkbox"/> Check Box
<p>* Spouse Details</p> <ul style="list-style-type: none"> * Full Name / Date of Birth / TFN * Taxable Income * Reportable Fringe Benefits / Superannuation * Pensions & Allowances / Trust Income / Investment Losses * Child Support Paid 	<input type="checkbox"/> Check Box