

2018 INDIVIDUAL TAX RETURN CHECKLIST

1 July 2017 - 30 June 2018

CLIENT DETAILS

NAME: _____

ADDRESS: _____

TELEPHONE: (H) _____
(W) _____
(M) _____

EMAIL: _____



Income

- ☐ Salary & wages *Provide payment summaries / group certificates*
- ☐ Allowances, earnings, tips, director's fees, etc *Provide payment summaries / group certificates / other evidence*
- ☐ Employer lump sum payments *Provide payment summaries / group certificates / other evidence*
- ☐ Employment termination payments (ETP) *Provide ETP payment summaries*
- ☐ Australian Government allowances & payments (eg: youth allowance) *Provide payment summaries*
- ☐ Australian Government pensions & allowances (eg: age/carer pension) *Provide payment summaries*
- ☐ Superannuation annuities & pensions *Provide payment summaries / annual tax statements*
- ☐ Superannuation lump sum payments *Provide payment summaries / annual tax statements*
- ☐ Interest income (savings a/c, term deposits etc) *Provide bank statements*
- ☐ Dividend income (shares) *Provide share dividend statements*
- ☐ Managed fund investments *Provide annual tax statements*
- ☐ Capital gains from disposal of shares, property & investments *Provide contracts of sale / purchase*
- ☐ Foreign income *Provide evidence*
- ☐ Other income *Provide evidence*

Deductions

- ☐ Work related car expenses *Provide log book, evidence of expenses (except fuel), purchase contract (if new vehicle)*
- ☐ Work related domestic & overseas travel expenses *Provide receipts of airfares, accommodation etc*
- ☐ Work uniform & protective clothing expenses *Provide receipts for purchase and/or repairs and dry cleaning*
- ☐ Work related self-education expenses (books, stationary, student union fees) *Provide receipts*
- ☐ Other work related expenses (phone, union fees, home office running expenses, computer supplies) *Provide receipts*
- ☐ Interest & dividend deductions *Provide evidence*
- ☐ Gifts & donations *Provide evidence*
- ☐ Cost of managing tax affairs for previous financial year *Provide evidence*

Tax Offsets / Rebates

- ☐ Did you have Private Health Insurance? *Provide Annual Statement*
- ☐ Did you make super contributions on behalf of your spouse? *Provide documentation*
- ☐ Did you live or work in a remote or isolated area of Australia?

New Clients

- ☐ 2017 Income Tax Return