

INDIVIDUAL TAX RETURN CHECKLIST

Please check the following items and where they apply to your circumstances, gather the relevant documentation to present at your interview

INCOME

- PAYG Payment Summary (Group Certificates)
- Government or Centrelink Payments
- Interest Received from Savings
- Income Received on Shares and Managed Fund Statements
- Pension or Annuity Payment Summaries
- Foreign Source Income
- Lump Sum and Termination Payments
- Details of any Capital Gains/losses-
- Purchase & Sale Settlement Statements
- Income from Trusts & Partnerships Statements
- Rental Property Income- Agent Statement
- Employee Share Scheme Statement
- Business Income
- Foreign Income
- Any other income

DEDUCTIONS

- Work related Expenses including -
- Uniforms/Protective Clothing/Laundry
 - Home Office Expenses
 - Subscriptions
 - Professional Journals
 - Motor Vehicle Expenses- mileage details/log book
 - Local/Overseas Travel Expenses involving overnight stays
 - Sun Protection Items
 - Tools & Equipment, New Assets & Repairs
 - Telephone & Internet Expenses
 - Self-Education Expenses
 - Donations of \$2 and over
 - Investment Related Expenses (including rental property expenses & loan statements)
 - Tax Agent Fees
 - Income Protection Policy Renewal Notices
 - Super Contributions- if self employed

TAX OFFSETS

- Superannuation Contributions for Spouse
- Private Health Insurance Statement From Fund
- Spouse Income and Details
- Dependent Children Details
- Zone- Remote area details
- Medical Expenses paid if over the threshold and claimed last year
- HECS, HELP, SFSS and PELS debt statement
- DVA Pension & Defence Force Medicare Levy Exemption Certificate

ADJUSTMENTS

- Credit for interest on Early Payment of Tax (date & amount paid)
- PAYG Instalments paid during the year
- Super Contributions for Govt. Co-contribution scheme

Bank Details (Account Name, BSB & Account Number)

Required for all refunds from ATO

Make an Appointment, Scan & Email, or Post your tax documents to:

JSA Accounting

T: 8322 5088 **E:** enquiries@jsaaccounting.com.au

PO BOX 702 REYNELLA SA 5161

Edcom

T: 8231 1800 **E:** enquiries@edcom.com.au

PO BOX 6174 Halifax St SA 5000

Appointment Details:

Office: _____

Day: _____

Date: _____

Time: _____