

Individual Income Tax Return Checklist



RAYMOND PARTNERS
Accountants and Advisors

Name : _____
 Tax File Number: _____
 Date of Birth: _____
 Physical Address: _____
 Postal Address (if different): _____
 Contact Phone Number: _____
 Occupation: _____

Information	Information Provided	Not Applicable
Income		
Group Certificates	<input type="checkbox"/>	<input type="checkbox"/>
Centrelink Payments	<input type="checkbox"/>	<input type="checkbox"/>
Details of any other income received	<input type="checkbox"/>	<input type="checkbox"/>
Interest		
Details of Bank, Account Numbers and amounts of Interest Received	<input type="checkbox"/>	<input type="checkbox"/>
Income From Managed Funds	<input type="checkbox"/>	<input type="checkbox"/>
Dividends		
Please supply all copies of Dividends received	<input type="checkbox"/>	<input type="checkbox"/>
Rental Properties		
Rental Statements	<input type="checkbox"/>	<input type="checkbox"/>
Loan Statements	<input type="checkbox"/>	<input type="checkbox"/>
Copies of all expenses paid.	<input type="checkbox"/>	<input type="checkbox"/>
Diary Note or details of travel for inspections.	<input type="checkbox"/>	<input type="checkbox"/>
Capital Gains		
Purchase and/or sale details of any Shares, Rental Properties, Equity Trusts SOLD during the year.	<input type="checkbox"/>	<input type="checkbox"/>
Work related travel expenses		
Purpose of travel – log book or diary	<input type="checkbox"/>	<input type="checkbox"/>
Car related expenses	<input type="checkbox"/>	<input type="checkbox"/>
Distance Travelled including type of car	<input type="checkbox"/>	<input type="checkbox"/>
Work-related Uniform expenses		
Must be unique and distinctive to your organisation and compulsory. (employer's logo attached and clothing not available to general public).	<input type="checkbox"/>	<input type="checkbox"/>
Protective clothing i.e safety boots, sun-protection, rubber boots	<input type="checkbox"/>	<input type="checkbox"/>
Please note: Heavy duty items such as jeans, drill trousers, shorts & shirts are NOT claimable If uniforms are dry-cleaned please retain receipts.	<input type="checkbox"/>	<input type="checkbox"/>
Self Education Expenses		
Must be related to present employment.	<input type="checkbox"/>	<input type="checkbox"/>
Course fees, textbooks, Student union fees, travel etc details.	<input type="checkbox"/>	<input type="checkbox"/>

Any Other work expenses related to your Income for example:		
Home Office	<input type="checkbox"/>	<input type="checkbox"/>
Telephone	<input type="checkbox"/>	<input type="checkbox"/>
Books	<input type="checkbox"/>	<input type="checkbox"/>
Journals	<input type="checkbox"/>	<input type="checkbox"/>
Computers	<input type="checkbox"/>	<input type="checkbox"/>
Union Fees	<input type="checkbox"/>	<input type="checkbox"/>

Please ensure you maintain records of the amount of hours and work use % of your home office as the ATO are targeting home office expenses this year

General		
Donations to registered charities	<input type="checkbox"/>	<input type="checkbox"/>
Tax Agent fees	<input type="checkbox"/>	<input type="checkbox"/>
Details of Private Health Cover	<input type="checkbox"/>	<input type="checkbox"/>
Number of Dependant Children	<input type="checkbox"/>	<input type="checkbox"/>
Spouse's name, date of birth and Income.	<input type="checkbox"/>	<input type="checkbox"/>
Medical expenses over \$2,218 (or over \$5,233 for high income earners *) - after Medibank and Private Health re-imburements. If eligibility criteria met**	<input type="checkbox"/>	<input type="checkbox"/>

(* High income earners for the 14/15 year are singles earning over \$90,000 and families over \$180,000)

(**To be eligible for this medical tax offset in 14/15 you must either have received this offset in your 13-14 income tax assessment OR paid for medical expenses relating to disability aids, attendant care or aged care.)

Private Health Insurance Statements	<input type="checkbox"/>	<input type="checkbox"/>
Child Support Paid	<input type="checkbox"/>	<input type="checkbox"/>
Averaging for ALL primary producers	<input type="checkbox"/>	<input type="checkbox"/>

PLEASE NOTE THAT ALL CLAIMS MUST BE SUBSTANTIATED WITH RECEIPTS.

Tax Refunds- the ATO are no longer issuing refunds by cheque so could you please provide bank account details at your appointment

Please note that the above checklist is for initial consultation and more information may be requested to complete the tax returns.

If you have any difficulty understanding any of the requirements above, or have queries as to what information we may require, please do not hesitate to contact our office.

The information in this Checklist does not constitute advice. This Checklist is purely provided as a helpful guide to clients.