

Income tax Return Checklist

Income

- Payment summaries/Group Certificates
- Lump Sum and Termination Summaries
- Government payment summaries
- Interest Received for All Back Accounts for the Financial year
- Dividend Statements
- Managed Fund Statements
- Foreign Income Data
- Rental Income - Please refer to our rental schedule
- Capital Gains - Sale of Property - Please refer to our rental schedule

Other Income

- Confirm Number of Dependent Children and Marital Status
- Supply us with your Spouse/Partners Taxable Income (If we are not preparing their return)
- Confirm your Bank Details to Obtain Refunds from the ATO
- Bring Mode of Payment - Payment is required prior to lodgment

Basic Deductions

- Donations
- Accounting Fees
- End of Financial Year Income Protection-Outside Super - Statement required for viewing
- Notice of Intention to Claim Acceptance Letter from Super Fund in Relation to Personal Super Contributions - Statement required for viewing
- Uniform/Workwear (with logo or protective wear)
- Self-Education Related to Current Role
- Union/Registrations/Subscriptions/Memberships Fees Paid Related to Work
- Tools/Stationery/Office Equipment purchased for work purposes
- Seminars or Conference Expenses Relating to Work
- Work Related Travel
Fares/Accommodation/Food/Parking/Tolls
- If Vehicle Used for Work and No Logbook Available - Please Supply the Number of KM's Driven for Work Purposes if Applicable. (to and from work does not count)
- If Vehicle Log Book- Record required for 3 Consecutive Months Noting Business and Private Travel - A copy must be supplied
- Odometer readings as at the first and last day of the financial year (1st July and 30th June)
- Finance on Vehicle - Expenses Summary by Maintenance/Registration/Petrol/Insurance/Interest for the Financial Year
- Other Costs Incurred in Earning Income

Call us on 07 5515 9160

While you are here take advantage of some of THURA'S additional services including: -

- *Loan reviews*
- *Personal budget analysis and advice*
- *Superannuation review and insurances.*