

2012 Individual Tax Return Checklist

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Name of taxpayer: _____

Address: _____

Preferred Contact No: _____

Information	Information Provided	Not Applicable
Income		
PAYG summaries from employers	<input type="checkbox"/>	<input type="checkbox"/>
Lump sum payments (eg Employment Termination Payment)	<input type="checkbox"/>	<input type="checkbox"/>
Trust distribution statement, including copy of the trust's tax return	<input type="checkbox"/>	<input type="checkbox"/>
Managed fund annual tax statement and capital gains tax statement	<input type="checkbox"/>	<input type="checkbox"/>
Partnership distribution statement, including a copy of the partnership's tax return	<input type="checkbox"/>	<input type="checkbox"/>
Dividend statements	<input type="checkbox"/>	<input type="checkbox"/>
Bank statements stating interest earned	<input type="checkbox"/>	<input type="checkbox"/>
Term deposit statements stating interest earned	<input type="checkbox"/>	<input type="checkbox"/>
Buy/sell contract notes for shares (if any shares were sold)	<input type="checkbox"/>	<input type="checkbox"/>
Work-related Deductions		
Details of depreciable assets bought during the year (eg laptops)	<input type="checkbox"/>	<input type="checkbox"/>
Professional journals/magazines	<input type="checkbox"/>	<input type="checkbox"/>
Professional memberships/subscriptions	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for continuing professional development courses and seminars	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for self-education expenses	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for other work-related deductions such as protective clothing, uniform expenses and travel	<input type="checkbox"/>	<input type="checkbox"/>
Vehicle logbook for motor vehicle expenses (if using the logbook method)	<input type="checkbox"/>	<input type="checkbox"/>
Other Deductions		
Receipts for donations of \$2 and over to registered charities	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in managing tax affairs (eg tax agent's fees)	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in earning investment income	<input type="checkbox"/>	<input type="checkbox"/>
Income protection insurance premiums	<input type="checkbox"/>	<input type="checkbox"/>
Rental Properties		
Annual statement from property agent (if engaging the services of an agent)	<input type="checkbox"/>	<input type="checkbox"/>
Date of when property was purchased	<input type="checkbox"/>	<input type="checkbox"/>
Details of depreciable assets bought or disposed during the year	<input type="checkbox"/>	<input type="checkbox"/>
Expenses incurred, which are not detailed on the property agent annual statement, such as water charges, land tax and insurance premiums	<input type="checkbox"/>	<input type="checkbox"/>

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If property is held by more than one individual, please provide details of owners and their legal ownership percentage		
If property was disposed off during the income year, information relating to dates and costs associated with the acquisition and disposal of the property		
Loan statements for property showing interest paid for the income year		
Period property was rented out during the income year		
Records detailing rental income (if not engaging the services of an agent)		
Records of expenses relating to the property (if not engaging the services of an agent)		
Offsets / Rebates		
Details of any superannuation contributions for spouse		
Details of dependants, including their age, occupation and income		
Details of medical expenses where the total exceeds \$2,060 (after Medicare and private health fund rebates)		
Private health insurance statement (if insurance is held with your partner, please state who is the primary holder and provide the age of your partner)		
If Operating as a Sole Trader		
Cashbook, which includes records of drawings taken before the business takings were banked		
Copies of Business Activity Statements lodged		
Copies of PAYG summaries for employees		
Details of any government grants, rebates or payments received		
Details of superannuation contributions for employees		
Details of any assets purchased, including date of purchase and amount		
Payments of salaries and superannuation to associates		
Records from accounting software (eg trial balance, P&L and balance sheet)		
Statements of all liabilities of the business		
Notice of superannuation contributions for self-employed persons		
Other Information		
Copies of Installment Activity Statements lodged		
Details of any employee share scheme		
Any other information that you think is relevant		