

TAX RETURN CHECKLIST 2010

Name:

Address:

Phone No: Day: **Mobile:**

Email Address:

INCOME		Y	N	
Salary / Wages / Centrelink (PAYG Forms)	<input type="checkbox"/>	<input type="checkbox"/>		Please include copies of your Group Certificates
Eligible Termination Payment	<input type="checkbox"/>	<input type="checkbox"/>		Attach ETP Statements
Interest Received	<input type="checkbox"/>	<input type="checkbox"/>		Include either bank statements or a summary of interest received.
Dividends / Distributions	<input type="checkbox"/>	<input type="checkbox"/>		Include statements of dividends paid from 01/07/09 to 30/06/10
Shares or options from Employee Share Schemes	<input type="checkbox"/>	<input type="checkbox"/>		Include any statements showing value of shares and date of acquisition
Partnership / Trust	<input type="checkbox"/>	<input type="checkbox"/>		Include yearly Tax Summaries from trusts such as BT, Colonial, AXA etc.
Capital Gains (e.g.property or shares sold)	<input type="checkbox"/>	<input type="checkbox"/>		Please included details of sale and purchase and copies of contracts
Foreign Employment Income	<input type="checkbox"/>	<input type="checkbox"/>		Include PAYG Summaries, receipts, statements & any other information relevant
Rental Income	<input type="checkbox"/>	<input type="checkbox"/>		Please provide details of rent income and expenses including interest on loans.
Other Income	<input type="checkbox"/>	<input type="checkbox"/>		Please include details of any other income received during the year.

DEDUCTIONS				
Work related Car Expenses	<input type="checkbox"/>	<input type="checkbox"/>		Provide total work km's travelled or Log Book, car expenses paid & engine capacity (.....cc)
Uniforms, Prot Cloth, CL&M, etc	<input type="checkbox"/>	<input type="checkbox"/>		Include dry cleaning & purchases of Logo'd or Protective Clothing (i.e Boots overalls etc)
Other Work Expenses				
Diary / Stationery / Work Materials / Tools	<input type="checkbox"/>	<input type="checkbox"/>		Please provide details of all purchases including date of purchase if a single item costs more than \$300
Union or Professional fees	<input type="checkbox"/>	<input type="checkbox"/>		Please provide details if this item is not shown on your PAYG Payment Summary
Sickness & Accident Insurance / Income Protection	<input type="checkbox"/>	<input type="checkbox"/>		Please provide details
Seminar costs or Self Education	<input type="checkbox"/>	<input type="checkbox"/>		Please provide km's travelled, accomodation & meals, course fees, text books, printing, stationary costs and any other expenses you think relevant
Expenses for Interest or Dividend Income				
Bank Fees and Interest costs	<input type="checkbox"/>	<input type="checkbox"/>		Bank statements would provide this information
Investment advice annual review fee (but not Capital cost on Investing)	<input type="checkbox"/>	<input type="checkbox"/>		Please provide details or receipts of any financial advice received
Gifts or Donations > \$2	<input type="checkbox"/>	<input type="checkbox"/>		Details or receipts to a registered charity. List charity name and amount donated
Tax Agent fees paid	<input type="checkbox"/>	<input type="checkbox"/>		Please provide details of fees for accountancy work done particularly if work was not done by Clifton's
Travel to Agent:kmcc	<input type="checkbox"/>	<input type="checkbox"/>		How many trips did you make or km's travelled to your accountant in the last financial year?

TAX OFFSETS				
Private Health Cover				
Do you have private health cover?	<input type="checkbox"/>	<input type="checkbox"/>		Please provide a copy of the health fund statement they send after the end of the financial year
Spouse				
Did you have a spouse for the full financial year? Y/N?	<input type="checkbox"/>	<input type="checkbox"/>		
Did your dependant spouse earn any income?	<input type="checkbox"/>	<input type="checkbox"/>		Please provide spouse's taxable income
Does your spouse receive any benefits from Centrelink?	<input type="checkbox"/>	<input type="checkbox"/>		Please provide details of benefits
Superannuation				
Have you made any personal contributions to a superannuation fund?	<input type="checkbox"/>	<input type="checkbox"/>		Please provide details
Medical Expenses				
You may be entitled to a rebate if your out of pocket expenses on medical exceeds \$1500	<input type="checkbox"/>	<input type="checkbox"/>		Please provide a summarised total of your expenses (out of pocket amounts only)
Education Tax Refund				
Do you have primary or secondary school students	<input type="checkbox"/>	<input type="checkbox"/>		Include number of primary and secondary students
Did you purchase any computer equipment?	<input type="checkbox"/>	<input type="checkbox"/>		Include description of equipment and purchase price
Please provide totals for internet, stationary & text books for the year	<input type="checkbox"/>	<input type="checkbox"/>		

OTHER				
Tax free government pensions	<input type="checkbox"/>	<input type="checkbox"/>		This is required to report Adjusted Taxable Income as required by the ATO
Child support you paid	<input type="checkbox"/>	<input type="checkbox"/>		Child support payments reduces adjusted taxable income increasing eligibility to benefits
Please provide any other details which you are unsure of and would like us to be aware of	<input type="checkbox"/>	<input type="checkbox"/>		

Clients Signature _____ **Date** _____