

## **2009 Individual Tax Return Checklist**

When you come in to see us at A Grade Tax, please bring the following items to assist us in completing your tax return:

### **Employment Deductions**

- # Schedule of work related expenses i.e. tools, phone, uniform, income protection insurance
- # Receipts or evidence of car / travel / protective clothing / protective eyewear
- # Union fees

### **Investment related deductions**

- # Interest / fees on borrowing for investment purposes (bring statements)
- # Asset purchase / Asset sale agreements

### **Other deductions**

- # Tax Agent Fees
- # Superannuation if self employed
- # Receipts for donations to charity
- # Receipts for self education expenses eg books, computer costs, travel, course fees, stationery

### **Investment property**

- # Water charges
- # Bank fees
- # Details of when property was rented, including any rental or Agents statements
- # Date when property was purchased
- # Cost & date of any improvements
- # Interest on loans
- # Advertising fees
- # Agent fees
- # Body corporate fees
- # Borrowing expenses
- # Repair & maintenance expenses
- # Council rates
- # Gardening & mowing fees
- # Insurance premiums paid
- # Land tax details
- # Travel costs & details

### **Offsets**

- # Spouse contributions to super
- # Private health insurance statement
- # Medical receipts if out of pocket expenses exceed \$1,500
- # Zone – if living in remote area
- # Education costs for Primary & high school students – see separate worksheet

### **Other useful information**

- # Loan statements
- # BSB & bank account details

### **Income earned statements**

- # PAYG Payment Summaries (Group Certificates)
- # Centrelink statements
- # Bank statements showing interest
- # Tax statements from Fund Managers
- # Share dividend statements
- # Contract notes for share buy & sell transactions
- # Trust distribution statements
- # Details of any assets sold
- # Lump sum payments – Eligible Termination Payment Statements
- # Rental income
- # Partnership distributions
- # Foreign source income

### **New clients**

- # Last years income tax return
- # Previous years accountants fees
- # Prior year tax losses