



## 2016 Income Tax Return Checklist

To assist in preparing your Income Tax Return, please complete this simple checklist. Completing this checklist will ensure we maximise your Tax refund.

Full name	.....
Address	.....
Date of birth (DOB)	.....
Tax file number	.....
Contact number	.....
Email address	.....
Refund deposit banking details	.....

### 1. Income

- ☐ PAYG Payment Summaries (formally known as Group Certificates)
- ☐ Eligible Termination Payments
- ☐ Did you receive interest income throughout the year?
- ☐ Did you receive any Dividend income throughout the year?
- ☐ Did you sell &/or transfer any investments throughout the year?
- ☐ Did you receive any Distribution from a Partnership or a Trust?
- ☐ Did you receive any Government payments throughout the year?
- ☐ Did you receive any Foreign income throughout the year?
- ☐ Did you receive any Business income throughout the year?
- ☐ Did you receive any Rental income throughout the year?

### 1.1 Rental Income/Investment Property checklist

- |  |  |
|--|--|
| <input type="checkbox"/> Rental statements (incl annual summary) | <input type="checkbox"/> Borrowing expenses                      |
| <input type="checkbox"/> Bank fees                               | <input type="checkbox"/> Cleaning and maintenance expenses       |
| <input type="checkbox"/> Interest on mortgage                    | <input type="checkbox"/> Insurance premiums                      |
| <input type="checkbox"/> Council rates                           | <input type="checkbox"/> Land tax details                        |
| <input type="checkbox"/> Water charges                           | <input type="checkbox"/> Depreciation schedule                   |
| <input type="checkbox"/> Agent's fees & Advertising fees         | <input type="checkbox"/> Purchase price and date (if applicable) |
| <input type="checkbox"/> Body corporate fees                     | <input type="checkbox"/> Selling price and date (if applicable)  |

**Please note:** This checklist only covers the most common items in a tax return. Should you wish to discuss this checklist or any other tax or accounting matter, please contact our office.



## 2. Deductions

- ☐ Did you use your Motor Vehicle for work travel throughout the year?
- ☐ If yes, did you travel more than 5000 work kms?
- ☐ Other travel and accommodation expenses
- ☐ Work related uniform expenses? (including footwear and laundry)
- ☐ Tools and equipment
- ☐ Income protection insurance
- ☐ Self education/development courses (including travel, meals and accommodation)
- ☐ Professional memberships and subscriptions
- ☐ Mobile telephone expenses
- ☐ Internet service provider expenses
- ☐ Trade union dues
- ☐ Home office expenses
- ☐ Donations
- ☐ Tax return preparation fee

## 3. Tax offsets and rebates

- ☐ Private health insurance tax statement
- ☐ Dependants & invalid carer – name, DOB and legal responsibilities
- ☐ Did you live in a remote area in order to carry out your occupation?
- ☐ Spouse contributions to superannuation
- ☐ Superannuation pension rebates
- ☐ Medical expenses rebate (Only available for disability aids, attendant care or aged care)

## 4. Other

- ☐ Do you have a HELP/SFSS debt?
- ☐ Did you have a spouse during the financial year? If so, please provide:

Name	DOB	Income	

At National Taxation, we understand that everyone's situation is different. Our tailored service will help you minimise your taxation and better manage your financial & business affairs.

We have the expertise to cater for all facets of accounting, taxation and SMSF. We are equipped with the latest knowledge to ensure that your requirements are prepared in the most professional manner, with no risk and at a low cost.

For your convenience you can:

- visit our office at 82B Charman Road, Mentone (evening appointments available) or
- we will come to you, at your place of work or home (evening appointments available) or
- you can send us your documentation and we will contact you.