

# 2018 PERSONAL INCOME TAX RETURN CHECKLIST



We have provided you with this checklist to assist in gathering all your information for us to complete the 30 June 2018 income tax return.

*Please return the completed checklist with the required information (not original documentation - copies only) to our office or via email.*

Information Required	Information Provided	Not Applicable
<b>INCOME</b>		
<b>PAYG Payment Summary from Employers:</b> Include ETP's, Payment Summaries from Centrelink and Superannuation Pensions <b>What is your main occupation</b> _____	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
<b>Interest Received:</b> Provide details of the financial institution including the account name, number and total TFN deducted	<input type="checkbox"/>	<input type="checkbox"/>
<b>Dividends received:</b> Copies of dividend advice – include dividends re-invested as DRPs	<input type="checkbox"/>	<input type="checkbox"/>
<b>Trust &amp; Partnership Distributions (including managed funds):</b> Provide copies of trust and partnership annual 2018 taxation summary statements	<input type="checkbox"/>	<input type="checkbox"/>
<b>Capital Gains/Losses:</b> If you have made Capital Gains or Losses on Property, Shares or Other Investments (Australia & Overseas) please provide the contract and settlement statements for all <b>purchases &amp; sales</b> (include all associated costs, e.g., legal costs, agent's commissions) <b>Have you sold your main residence during 2018?</b> Yes <input type="checkbox"/> No <input type="checkbox"/> <b>Have you sold any pre-CGT assets (purchased pre- 20 Sept 1985) during 2018?</b> Yes <input type="checkbox"/> No <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Foreign Income:</b> Details of overseas income (eg wages, interest, pensions, rental income and other – include any tax paid)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Other Income:</b> eg. Business income, primary production (including stock on hand as at 30 June), foreign exchange gains & shares from employee share schemes.	<input type="checkbox"/>	<input type="checkbox"/>
<b>RENTAL PROPERTY:</b>		
Please complete our Rental Property checklist for each rental property.	<input type="checkbox"/>	<input type="checkbox"/>
If you purchased or sold any property during the year, please complete page 2 of our Rental Property checklist	<input type="checkbox"/>	<input type="checkbox"/>
<b>DEDUCTIONS</b>		
<b>Motor Vehicle Expenses:</b> <i>If the motor vehicle was purchased during the year, please provide documents to support the purchase price and finance (if applicable).</i> Registration \$ _____ Insurance \$ _____ Fuel \$ _____ Repairs \$ _____ Leasing expenses \$ _____ Please provide a copy of your logbook if applicable. <i>Note: Logbooks completed from the 2013/2014 year or later, can be used in the 2017/2018 year. A logbook is only valid for 5 years.</i> Alternatively, please provide the number of business km's travelled during the year: Km's Travelled _____ km	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<b>Travel Expenses:</b> Provide a summary of expenditure incurred	<input type="checkbox"/>	<input type="checkbox"/>
<b>Home office expenses: (There are two main methods of claiming home office deductions)</b> <ul style="list-style-type: none"> <li>Based on the number of hours you work from home each week (eg. Average of 5 hrs per week for 48 weeks of the year); OR</li> <li>Based on the m<sup>2</sup> that your home office occupies in your home as a % of the total m<sup>2</sup> of your home. In addition to the size of your office and house, this method would require all of your annual electricity and gas costs.</li> </ul> Can you please advise if you worked from home at all during the year? If yes, please provide sufficient details to enable the claim under one of the methods above.	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
<b>Uniform/Protective Clothing, Laundry &amp; Dry Cleaning:</b> Provide a summary of expenditure incurred.	<input type="checkbox"/>	<input type="checkbox"/>
<b>Self-Education (The deductions must have a connection to your current employment):</b> e.g. Depreciation of computer (apportioned), text books, student union fees, course fees, stationery & travel expenses. You cannot claim contributions or repayments that are made under HECS-HELP, FEE-HELP, OS-HELP or SFSS.	<input type="checkbox"/>	<input type="checkbox"/>

