



2016 Individual Income Taxation Return Checklist

IMPORTANT NOTE – WORKFLOW MANAGEMENT

(During peak period of July to December a turnaround time of 4 - 6 weeks is expected)

Please advise the following:

- a. I would like to electronically sign my completed Income Taxation Return/s
- b. Return required urgently? Yes No (refer c)
- c. Time required (please choose) 9-15 weeks 16 -24 weeks anytime prior to due date

Name:

Address:

Ph: Wk: M:

Email:

<p>Income</p> <ul style="list-style-type: none"> <input type="checkbox"/> PAYG Summary Statement/s. <input type="checkbox"/> Interest received. <input type="checkbox"/> Share Dividend Statements. <input type="checkbox"/> Managed Fund Annual Tax Statements. <input type="checkbox"/> Buy/ Sell Contract Notes. <input type="checkbox"/> Lump Sum Payment Statements (e.g Eligible Termination Statements). <p>Deductions</p> <ul style="list-style-type: none"> <input type="checkbox"/> Details of donations to charities. <input type="checkbox"/> Details of work related deductions (e.g car/travel/uniform/laundry). <input type="checkbox"/> Details of self education expenses (e.g fees/books/computer costs/travel expenses). <input type="checkbox"/> Bank statements / total interest for borrowed funds to purchase investments. <input type="checkbox"/> Details of Income Protection Insurance. 	<p>Rental Income</p> <ul style="list-style-type: none"> <input type="checkbox"/> Annual Agent's Statement. <input type="checkbox"/> Invoices for any amounts paid personally (e.g council rates/water rates/insurance etc.). <input type="checkbox"/> Loan Statements / interest paid. <p>(If you require a folder to assist in collating information please contact our office)</p> <p>Other Information</p> <ul style="list-style-type: none"> <input type="checkbox"/> Private Health Insurance statement. <input type="checkbox"/> Net medical expenses for disability aids, attendant care or aged care (this offset is only applicable for the listed expenses exceeding the current threshold of \$2,265). <p>New Clients</p> <ul style="list-style-type: none"> <input type="checkbox"/> Prior Year's Income Tax Return. <input type="checkbox"/> Prior Year Accountancy Fees. <p><i>If you are expecting a refund we also need your bank account details as the ATO no longer pays by cheque.</i></p>
---	--

