



**2010 INDIVIDUAL TAX RETURN CHECKLIST**

To assist us in completing your 2010 Income Tax Return, please complete the following checklist and return to us together with the selected items.

**Employment Income**

	Yes	No	N/A
PAYG Payment Summaries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lump Sum and Termination Payment Summary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Employment Related Income	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Directors Fees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Investment Income Statements**

Bank Statements - showing interest received	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dividend Statements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trust Distribution Statements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Capital Gains Tax Statements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Managed Funds Statements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Foreign Source Income and details of any Foreign Tax Credits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Other Income**

Government Pensions and Allowances	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Pensions and Allowances	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Details of any Capital Assets Sold.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Rebates & offsets**

Private Health Insurance Statement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Details of Medical Expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Details of School Education Expenses [see attached for eligibility requirements]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Investment Property**

	Yes	No	N/A
Property / Agent Rental Statements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advertising Fees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Body Corporate Fees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Borrowing Costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rates & Taxes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Insurance Premiums Paid	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interest Paid	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inspection Fees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Repairs and Maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Land Tax Paid	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Improvements and Renovations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Depreciation Schedules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Deductions**

Motor Vehicle Expenses - details of km travelled and/or details of expenses incurred	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Home Office Expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gifts or Donations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tax Agent Fees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Self Education fees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Subscriptions and Journals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Related Clothing Expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tools of Trade	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Income Protection Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Travelling Expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Other relevant items**

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