

Tax Return Checklist 2016



Katie Kirkland
chartered accountant

Information	Provided	Not applicable
Income		
PAYG summaries from employers, Centrelink and/or Superannuation Funds	<input type="checkbox"/>	<input type="checkbox"/>
Government pensions and allowances / Other pensions and annuities	<input type="checkbox"/>	<input type="checkbox"/>
Interest earned on bank accounts	<input type="checkbox"/>	<input type="checkbox"/>
Dividend statements & Employee Share Scheme (ESS) Statements	<input type="checkbox"/>	<input type="checkbox"/>
Lump Sum Payments (e.g., Employee Termination Payments)	<input type="checkbox"/>	<input type="checkbox"/>
Managed Fund – annual tax statement and capital gains tax statement	<input type="checkbox"/>	<input type="checkbox"/>
Partnership distribution statement, including copy of partnership's tax return	<input type="checkbox"/>	<input type="checkbox"/>
Trust distribution statement, including copy of the trust's tax return	<input type="checkbox"/>	<input type="checkbox"/>
Buy/sell contract notes for investments	<input type="checkbox"/>	<input type="checkbox"/>
Work-related Deductions		
Work-related motor vehicle use (details of work-related kilometres travelled during year and engine capacity)	<input type="checkbox"/>	<input type="checkbox"/>
Work-related deductions (e.g., protective clothing, uniform expenses, stationery, travel, tolls, parking, tools, union fees)	<input type="checkbox"/>	<input type="checkbox"/>
Home office running expenses (e.g., power, phone/internet, depreciation of office furniture, or hours to be claimed at the ATO's standard hourly rate)	<input type="checkbox"/>	<input type="checkbox"/>
Self-education expenses, professional development courses & seminars	<input type="checkbox"/>	<input type="checkbox"/>
Professional journals, magazines, memberships & subscriptions	<input type="checkbox"/>	<input type="checkbox"/>
Details of depreciable assets purchased during year (e.g., laptop)	<input type="checkbox"/>	<input type="checkbox"/>
Other Deductions		
Donations \$2 and over to registered charities	<input type="checkbox"/>	<input type="checkbox"/>
Tax Agent/Accountant fees	<input type="checkbox"/>	<input type="checkbox"/>
Expenses incurred in earning investment income	<input type="checkbox"/>	<input type="checkbox"/>
Income protection insurance premiums	<input type="checkbox"/>	<input type="checkbox"/>
Rental Properties		
If property held by more than one individual, details of owners and their legal ownership percentage	<input type="checkbox"/>	<input type="checkbox"/>
Date property purchased (contract date), unless contract already provided		
Dates property was available for rent during year	<input type="checkbox"/>	<input type="checkbox"/>
Annual statement from property agent or details of income and expenses	<input type="checkbox"/>	<input type="checkbox"/>
Details of any expenses not included on annual statement (e.g., insurance, rates, water)	<input type="checkbox"/>	<input type="checkbox"/>
Details of depreciable assets bought or disposed of during year	<input type="checkbox"/>	<input type="checkbox"/>
Loan statements showing interest paid on investment loan	<input type="checkbox"/>	<input type="checkbox"/>
If property sold during year, copy of sale and purchase contracts and settlement statements	<input type="checkbox"/>	<input type="checkbox"/>
Quantity Surveyor's Report (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>

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Miscellaneous		
Private health insurance annual statement	<input type="checkbox"/>	<input type="checkbox"/>
Total child support payments made during financial year	<input type="checkbox"/>	<input type="checkbox"/>
If spouse tax return completed elsewhere, spouse income, reportable fringe benefits, reportable superannuation, financial investment or rental property losses	<input type="checkbox"/>	<input type="checkbox"/>
Superannuation contributions in addition to employer super guarantee		
Names and dates of birth of any dependents, unless previously provided	<input type="checkbox"/>	<input type="checkbox"/>