

**CHECKLIST OF ITEMS WHICH MAY APPLY
FOR PREPARATION OF INDIVIDUAL INCOME TAX RETURNS
FOR YEAR –END TAX/ACCOUNTING WORK**

INCOME:

- Group certificates (called PAYG payment summary)
- Bank interest earned inc. bank account details
- Dividend notices
- Managed funds/trust – distribution notices
- Rental properties
 - Agents statements
(many agents now produce
an annual statement) -
 - Rate notices) These may
 - Insurance invoice/s) appear on
 - Body Corporate notices) agent's
 - Repairs & maintenance) statements if
 - Interest on loans used) paid for you by
 - to purchase the property.) the agent.
- Pension/Annuity notices
- Overseas pensions
 - Australian dollar amounts
received in the year

EXPENSES:

- Motor vehicle expenses
 - Fuel
 - Registration
 - Insurance
 - Repairs, services
 - Tyres & parts
 - HP/lease contracts
 - Purchase record
(showing cost of car)
 - Log book (if kept)
- Other work related deductions
 - Mobile/telephone expenses
 - Union fees
 - Income protection insurance
 - Seminar costs
 - Study expenses
 - Tools
 - Computer expenses

Expenses: (Cont)

- | | | |
|--------------------------|-----------------|---|
| <input type="checkbox"/> | Travel expenses | Flight & accommodation expenses
Conference registration fees |
| <input type="checkbox"/> | Uniforms | Purchase receipts
Laundering/dry cleaning |

Added information:

- Details of Private Health Insurance/Annual Statement.

The above are just a short list of the most common income and expense items most taxpayers may have.

If in doubt about any items you may have that are not listed, please bring it/them to your appointment.