



Individual Tax Return Checklist - 2017

Basic Returns start from \$88
STD from \$110
Rental & Sole Trader from \$143

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Contact Information

First name	Last name	Date of Birth
Phone number	Email:	
Residential Address	Post Address (leave blank if same as residential)	
Spouse Details: Name - DOB		
Best method for contacting you?	Best time of day to reach you?	

Occupation	Business Trading Name & ABN
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INCOME

- PAYG Summaries
- Government Pensions/Allowances
- Interest earned from Banks
- Dividends Statements
- Rental Property year end Statement and Details
- Sole Trader Income & Expenses

PAYG Salary and Wage EXPENSES

- D1 Motor Vehicle Expenses
- D2 Other Travel
- D3 Work Uniform & Protective Wear
- D4 Self Education Expenses
- D5 Other Work Expenses
- Gifts or Donations
- Last years Tax Return Fee

List your Income and Expenses here:
Keep all copies of receipts that you make a claim for.

We will need copy's of PAYG Payment Summaries email to us.

Documents and Files

Previous Year Tax Return

Buy & Sell documents for Shares Sold this year
2015-16

Rental Property Loan Statements

Rental Property - Expense not on Agent Statement

Business Software backup file

Business Asset purchase list

Distributions received from Trust/s or Partnership/s

Managed Fund Distribution Statement/s

Medical Expense if claimed in 2014 (more than
\$2,120)

Private Health Statements

Superannuation Contributions if Self Employed

Additional notes:

Tick the box beside the items that apply to you. Attach your documents with this checklist and e-mail them us.

Attach any other documents that are relevant.

Also add in the Additional Notes area D.O.B of all dependant children.

An accountant will contact you to verify the information and ask other question from our comprehensive checklist.

If you have any questions please contact us.