

Tax Return Checklist

Last year's tax return & assessment notice
Group certificate from employers, Centrelink, Austudy, pension, ETP
payment certificate
Superannuation withdrawal documents
Family Tax Assistance Statements of Benefits
Bank statements & saving books with interests entered as at 30th June
Distribution, interest & dividend slips (if any)
PPS Statements (if any) & ETP payment statements
HECS details (if any) Austudy loans (if any)
Receipts for all work related expenses & deductions
Motor vehicle log books (ATO approved Version only) for deductible work
travel
Receipts for donations and self - education (work related)
Details of spouse's income if claiming a sole parent rebate
Details of child's income if claiming a sole parent rebate
Private Health Insurance certificate
Medical expenses over \$1500, details of all medical expenses
For Rental Properties: Agent's statements and details of all expenses,
interest, council & water rate, levies, repair and maintenance, travel, etc
For Business: Details of all income & expenses, bank statements, cheque
butts, deposit books and details of all assets used in the business and their
costs, etc
For Companies: Last year's accounts and tax returns, bank statements,
cheque butts, deposit books and details of all assets used in the business
and their costs, etc
BAS and IAS returns lodged
Dividend statements for company shares

Name:

Signature:

Please Print our Tax Return Checklist

For further enquiries, please email to: info@taxprofessionals.com.au

Copyright © 2001-2005 Tax Professionals. All Rights Reserved.