



RANGE
PARTNERS
Certified Practising Accountants

Individual Income Tax Return Checklist

INCOME	
PAYG Summaries including allowance details (usually on last payslip for the financial year)	<input type="checkbox"/>
Employer lump sum payments/ employment termination payments	<input type="checkbox"/>
Pensions or Government payments/Allowances	<input type="checkbox"/>
Australian superannuation lump sum payments or income streams	<input type="checkbox"/>
Interest earned for the relevant year from the banks, building societies etc.	<input type="checkbox"/>
Dividend Statements	<input type="checkbox"/>
Details of rental property income	<input type="checkbox"/>
Details of any business income	<input type="checkbox"/>
Details of any other income earned including Capital Gains- did you sell any property, shares or other investment?	<input type="checkbox"/>
EXPENSES	
Work Related Expenses For example: <i>uniform, tools, education, fees etc.</i>	<input type="checkbox"/>
Motor Vehicle Expenses <i>Incl. estimation of Kilometres if no logbook kept, otherwise logbook and all expense items</i>	<input type="checkbox"/>
Travel Expenses	<input type="checkbox"/>
Investment Expenses For example: <i>bank fees, financial advisors fees, investment borrowings etc.</i>	<input type="checkbox"/>
Rental Property Expenses For example: <i>council rates, body corp fees, agent fees, interest on loan, repairs and maintenance (inside and out), travel, water rates, depreciation schedule, land tax, insurance. Other details needed include date property was purchased and rented.</i>	<input type="checkbox"/>
Cost of managing tax affairs	<input type="checkbox"/>
Charitable donations	<input type="checkbox"/>
Personal superannuation contributions	<input type="checkbox"/>
Income protection Insurance	<input type="checkbox"/>

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Union Fees	<input type="checkbox"/>
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Offsets	
Private health insurance statement	<input type="checkbox"/>

<i>Other useful information</i>	
Bank statements (with account name and number, BSB number)	<input type="checkbox"/>
Loan statements if relating to an investment	<input type="checkbox"/>
Previous year’s accountant’s fees	<input type="checkbox"/>
Last year’s tax return	<input type="checkbox"/>
Prior year tax losses	<input type="checkbox"/>
Child support paid	<input type="checkbox"/>
Last Year’s Income Tax Return if you are new to our firm	<input type="checkbox"/>
Records of sales and purchases of any shares, business or property	<input type="checkbox"/>
Private Health Insurance Details	<input type="checkbox"/>
Spouse Details	<input type="checkbox"/>
Medical receipts (if claimable)	<input type="checkbox"/>
Children’s details including D.O.B and evidence of any Centrelink benefits	<input type="checkbox"/>

If a tax accountant from Range Partners has any further questions or needs to discuss any information provided, my preferred time for them to call is _____, I can be contacted on this number _____.

DECLARATION & CONSENT

I declare that all the information that I have provided is true and correct, I understand the tax law imposes heavy penalties for giving false or misleading information. I have all the necessary receipts and records to evidence my claims for deduction. I authorise Range Partners to process my tax return based on the information I have provided them.

Signature

Date

Name