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## 2014 Individual Income Tax Return

### CHECKLIST

**We have created a checklist of the documents we will require if relevant to you to prepare your 2014 Individual Income Tax Return. If you need any more information about what documents we will need please contact us prior to your appointment to ensure we can complete your return as efficiently as possible.**

- Bank account details (*BSB and account number*) MUST be provided if you are expecting an Income Tax refund.
- Copy of your last completed Income Tax Return and Notice of Assessment (*Only if we did not prepare it*)
- Invoice for 2013 tax return preparation
- PAYG Payment Summaries (*Including Employment Termination Payment statements*)
- Payment Summaries for pensions or government allowances
- Interest income
- Dividend statements (*If sold shares we also need purchase and sale details*)
- Managed Fund statements
- Information on any partnership or trust distributions
- Details of superannuation withdrawals (lump sum or pension)
- Details of Employee Share Schemes
- Income and expenses from investment properties
- Business income and expenses
- Private Health Insurance Fund Tax Statement
- Receipts for all medical expenses if net expenses exceeded \$2120 (*Including dental, optical, prescriptions, etc.*)
- Receipts for Donations
- Work related car and travel expenses- registration number, summary of business kilometres travelled (*cars and utilities with less than one tonne carrying capacity only*), receipts for expenses (*e.g. fuel, interest on loan*), logbook (*if held*), tax invoice for new vehicles.
- Receipts for any work related expenses (*e.g. stationery, tools, telephone and internet, travel, uniforms, union fees.*)
- Receipts for any self-education expenses directly connected with your job (*e.g. course fees, text books, and accommodation and meal receipts for overnight stays.*)
- Child support payments paid by you
- Details of Income Protection Insurance and Sickness and Accident Insurance
- If we are not preparing your Spouses 2014 Income Tax Return we will require a copy. We will also require the dates you had a spouse between if it was not for the full year (*Spouse includes married, de facto and same sex partners*)
- Full names and date of birth of all dependants (*children up to the age of 21, full time students under the age of 25, parents or parents in law that are living with you*)

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