

Tax Return Checklist - Individual

Full Name:

Have your contact details changed since you last lodged a tax return? Yes No

If yes, please complete the details below:

Residential Address:

Postal Address:

Email:

Occupation:

Home Telephone : Mobile Telephone :

I have included the following documents:

Income

- PAYG Payment Summary
- Australian annuities or superannuation income streams
- Super lump sum payment
- Interest on bank accounts
- Dividends
- Trust distributions
- Partnership distribution

Deductions

- Work related car expenses
- Logbook of business kms
- Work related travel expenses
- Work related uniform (occupation specific, logo, protective clothing)
- Work related self education expenses
- Work related seminar or course expenses
- Home office diary (hours to be claimed)
- Work related computer and software (percentage of use)
- Work related telephone/mobile (percentage of use)
- Work related tools/equipment
- Work related subscriptions, union or professional body fees
- Work related journals/periodicals purchased
- Expenses relating to interest and dividend income
- Details of gifts or donations made by you
- Personal superannuation contributions

Edwards Marshall Financial Solutions (EMFS)

Not only is EMFS able to provide you with a detailed financial plan for your future but it is also able to assist you with your income protection, life and total & permanent disability insurance needs.

- I would like someone from EMFS to contact me.

Capital Gains (shares, rental properties, listed trusts)

- Purchase of any investment asset during the year
(purchase date, cost and number of shares/units or other)
- Sale of any investment asset during the year
(sale date, sale proceeds and associated costs)

Rental Property

- Annual rental statement
- Rental income
- Interest on loans
- Rates and taxes
- Repairs and maintenance
- Stationery, telephone, postage, travel
- Period your property was rented during the financial year

Foreign income

- Details of any overseas work
- Details of foreign investments and income earned

Medicare & Health Insurance

- Private health insurance details
- Details of net expense for disability aids, attendant or aged care

Family Information

- Full name, date of birth & taxable income of spouse/de facto
(if married/de facto during the year, provide date this occurred)
- Full names and dates of birth of dependents