

2019 Individual Tax Return Checklist



Name: _____

Contact No: _____

Tick box, collect and attach your receipts, tax invoices and documents that apply to you.
 - Makes your tax appointment or preparation of your return faster & easier

	Information Provided
Income	
PAYG payment summaries (eg from employers, superannuation etc.)	<input type="checkbox"/>
Pension or Government payments/allowances	<input type="checkbox"/>
Lump sum payments (eg employment termination payment)	<input type="checkbox"/>
Partnership/Trust distribution statement, and a copy of partnership's/trust's tax return	<input type="checkbox"/>
Documentation regarding foreign source income, foreign assets or property	<input type="checkbox"/>
Bank statements stating interest earned, including for term deposits	<input type="checkbox"/>
Dividend statements	<input type="checkbox"/>
Employee share scheme statements / letter from employer	<input type="checkbox"/>
Managed fund annual tax statement and capital gains tax statement	<input type="checkbox"/>
Buy/sell contract notes for shares (if any shares were sold/purchased)	<input type="checkbox"/>
Asset purchase/sale documentation (eg property settlement statements, contracts)	<input type="checkbox"/>
Other Income	
Income from insurance policies	<input type="checkbox"/>
Allowances eg Local Government allowance	<input type="checkbox"/>
Foreign Income	<input type="checkbox"/>
Jury service fees	<input type="checkbox"/>

APPOINTMENT

Date: _____ Day: _____

Time: _____

CALL FOR AN APPOINTMENT

217 Gouger Street
 Adelaide South Australia
 5000 Australia
 Telephone (08) 8221 6877
 vlassis@vlassisco.com.au
 www.vlassisco.com.au

Work-related Deductions

NB: Major ATO focus on work related deductions for 2018/19 – with full details of deductions provided to ATO

Details of depreciable assets bought during the year (eg laptops – include date purchased and cost)

Details and receipts for home office expenses eg electricity, home phone (**alternatively** can use cents per hour – *provide no. of hours worked* in home office based on keeping 4 week diary)

Professional journals/trade magazines, books

Professional memberships/subscriptions

Receipts for continuing professional development courses and seminars

Domestic and overseas travel expenses including travel diary for more than 6 nights in a row

Receipts for self-education expenses (where have direct connection with income activities)

Receipts for other work-related deductions such as protective clothing (*not conventional clothing*), uniform expenses, tools and equipment, union fees etc.

Motor vehicle expenses (**please provide log book where applicable**):

- a. Current log book percentage _____ and
- b. Running costs for the year _____ or
- c. Total work related km travelled _____

Expenses for utility trucks and vans used mainly for work related travel (eg fuel, insurance, registration, repairs, services, insurance etc.)



Other Deductions

Donations of \$2 and over to registered charities

Expenditure incurred in managing tax affairs (eg previous years tax agents fees)

Expenditure incurred in earning interest, dividend and other investment income (eg investment advice fees)

Personal Super Contributions (up to \$25,000 concessional contributions cap)

Income protection insurance premiums paid



Rental Properties

Rental property income & expenses (**proforma schedule attached may be used to summarise the rental property details required, or provide annual statement from property agent, if applicable**)

Expenses incurred such as water charges, land tax and insurance premiums

Loan statements for property showing interest paid for the income year




















Details of depreciable assets bought or disposed of during the year (including date & cost)

Details of any capital works on the property (including date & cost)

If the property was disposed of during the income year, information relating to dates and costs associated with the disposal of the property (eg settlements statement and contract)

NB: From 1 July 2017, travel expenses relating to inspecting, maintaining or collecting rent for a residential property are no longer deductible.



<p>Offsets/Rebates</p> <p>Details of any superannuation contributions for spouse (where spouse income is below (\$37,000)</p> <p>Details of medical expenses relating to disability aids, attendant care or aged care only where the total exceeds \$2,377 (after medicare and private health fund rebates) or \$5,609 where income is greater than \$90,000 for individual or \$180,000 for family</p> <p>Zone – if you live or work in a remote area, provide number of days in remote area</p> <p>Details of dependants, including their age, occupation and income</p> <p>Private health insurance tax statement</p>	<p></p> <p></p> <p></p> <p></p> <p></p>
<p>Small Business</p> <p>Details of Gross Income and Expense details of Business</p> <p>Records from cash book or accounting software (eg trial balance, profit and loss (P&L) and balance sheet) or copy of backup file</p> <p>Copies of Business Activity Statements lodged</p> <p>Copies of PAYG summaries for employees</p> <p>Details of any government grants, rebates or payments received</p> <p>Details of superannuation contributions for employees</p> <p>Details of any assets purchased, including date of purchase and amount</p> <p>Notice of superannuation contributions for self-employed persons</p>	<p></p> <p></p> <p></p> <p></p> <p></p> <p></p> <p></p> <p></p>
<p>Other Information</p> <p>Copies of Instalment Activity Statements lodged</p> <p>HECs-HELP statements</p> <p>Spouse Taxable Income</p> <p>Bank account details (eg BSB, Account number and name)</p> <p>Any other information that you think is relevant</p> <p>“My Deductions Tool” Application – If using the ATO’s app to record your income tax related deductions then please email a CSV file to our office</p>	<p></p> <p></p> <p></p> <p></p> <p></p> <p></p>

We will answer any questions you have, if you are unsure about the above items or any other queries.