

TAX RETURN CHECKLIST

Please complete and send with your supporting documents to taxreturn@barkersmith.com.au or fax to 08 9301 4566

<p>Income</p> <ul style="list-style-type: none"> <input type="checkbox"/> Payment Summaries (group certificates) <input type="checkbox"/> Centerlink-no longer send payment summaries we can obtain the details <input type="checkbox"/> Other Pensions (Both Foreign and Australian Superannuation) <input type="checkbox"/> Interest from Bank Accounts <input type="checkbox"/> Investment Income Summaries <input type="checkbox"/> Share Dividend Statements <input type="checkbox"/> Sale of Shares (with purchase info) <input type="checkbox"/> Lump Sum and Termination Payments <input type="checkbox"/> Income from Partnerships/Trusts <input type="checkbox"/> Foreign Income (inc Bank Interest) <input type="checkbox"/> Any Other Income from any source <p>Deductions</p> <p>Work Related Vehicle (does not include travel to and from place of work for employees)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Log Book (with fuel receipts etc) <input type="checkbox"/> Actual mileage recorded (limited to 5000km), no log book required 	<p>Work Related Uniform</p> <ul style="list-style-type: none"> <input type="checkbox"/> Purchase of uniform with logo <input type="checkbox"/> Purchase of protective clothing/boots <input type="checkbox"/> Laundry/Dry Cleaning of uniforms <input type="checkbox"/> Sun Protection for outdoor workers (Hats, glasses, sunscreen etc) <p>Self Education (related to current job)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Course Fees Paid (Uni, TAFE etc) <input type="checkbox"/> Textbooks <input type="checkbox"/> Computer, Printer, ink, paper etc <input type="checkbox"/> Stationery, Photocopying etc <input type="checkbox"/> Travel (log book or actual mileage) <input type="checkbox"/> Seminars/Workshops (not held at an educational institution) <p>Other Work Related Expenses</p> <ul style="list-style-type: none"> <input type="checkbox"/> Home office (hours/wk or actual cost) <input type="checkbox"/> Computer (business % only) <input type="checkbox"/> Home/Mobile Phone (business % only) <input type="checkbox"/> Tools and Equipment <input type="checkbox"/> Union Fees and memberships to professional associations <input type="checkbox"/> Subscriptions to Journals/Magazines 	<p>Gifts and Donations</p> <ul style="list-style-type: none"> <input type="checkbox"/> Receipts for donations to charities and registered building funds. <p>Miscellaneous Items</p> <ul style="list-style-type: none"> <input type="checkbox"/> Tax Agent's Fees from last year <input type="checkbox"/> Medical Expenses over \$2,162/\$5,100* (include all family prescriptions, hospital, dental etc less rebates from Medicare/Private Health Fund) Abolished (some exceptions). <input type="checkbox"/> Private Health Fund Tax Statement <input type="checkbox"/> Income Protection Insurance (not life) <input type="checkbox"/> Remote Zone Worker (more than 182 days in zone) Abolished. <p>Rental Property</p> <ul style="list-style-type: none"> <input type="checkbox"/> Income (rent received) <input type="checkbox"/> All expenses (inc advertising, agents fees, council rates, land tax, interest on loan, repairs, water charges, gardening, cleaning etc) <input type="checkbox"/> Loan set-up fees etc (for new loans) <input type="checkbox"/> Depreciation Report for new rentals
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Important Notes:

1. Where an expense has a private portion (eg Home Telephone or Home Computer) then only that percentage that relates to work use can be claimed based on records of *actual* usage.
2. Some Items (eg computers and tools greater than \$300) must be claimed over a number of years (depreciated).
3. Receipts and other evidence must be kept for *five* years from the date of lodgement of your tax return.
4. Medical Expenses Tax Offset has been abolished with the exception of aged and disability care.
5. Zone tax offset has been abolished for FIFO/DIDO workers. You must live in the zone to claim.

Your Name:

Your e-mail address: