2011/12 TAX RETURN CHECKLIST



Please ensure you fully complete ALL relevant questions and provide additional information as necessary on separate sheets and securely attach all documentation to this form.

PERSONAL DETAILS NAME MR/MRS/MS/MISS DATE OF BIRTH TAX FILE NO. ADDRESS OCCUPATION EMAIL (H) (M) PHONE (W) Spouse: Name_____ DOB_____ Income _____ (Please provide a copy of your spouse's income tax return if not prepared by our office.) Children Name DOB Income Name DOB Income Name DOB Income **INCOME** Tick if applicable & provide paperwork • Salary or wages (This includes paid parental leave payments) Bank Interest Allowances, earnings, tips, director's fees etc Employer lump sum payments **Employment termination payments** • Australian Government allowances & payments like Newstart, Youth Allowance & Austudy payments Australian Government pensions and allowances Australian annuities & superannuation income streams Australian superannuation lump sum payments Dividends paid 1/7/11 – 30/6/12 (Please provide paperwork if shares for all dividends paid including shares owned owned in Employee Share Plan) Distributions from partnerships and/or trusts Rental properties (see separate checklist) Business income

Foreign source income (including foreign pensions) & foreign assets

or property

INC	OME Con t' o	<u>d</u>			
•	Sale of assets	s with potential capital gains tax imp			
•	Proceeds fro Society Bond	m cashed in/matured Life Policies, Ir Is			
•	Forestry man	naged investment scheme income			
•	Other income (please specify)				
<u>wo</u>	ORK RELATEI	D DEDUCTIONS			
	=	ork related deductions exceed \$300 st the private use percentage where	-	ıbstantiate your total	claim with
1.	Car Expenses: Kilometres travelled:				
	·	Engine size (tick):	up to 1600cc		
			1601-2600cc		
			Over 2600cc		
	(Note: Tra	ivel to and from work is usually NOT	deductible.)		
2.	Domestic and/or Overseas Travel (attach details)			YES/NO	
3.	Work related clothing:				
		rchase of Compulsory Uniforms		\$	
		rchase of Protective Clothing	\$		
		Cleaning of Uniforms	\$		
	Does your Employer provide uniforms?			YES/NO	
	Do you have to launder uniforms?			YES/NO	
4.		tion expenses (attach details)		YES/NO	
5.	Conferenc	es & Seminars (attach details)		YES/NO	
6.	Other:	Union/Professional Membershi	ps	\$	
		Books/Reference Materials		\$	
		Sun Protection (if working outd	•	Ċ	
		(eg hat, sunscreen, sung	iiasses)	\$	
		Telephone & Internet	wook)	\$	
		Home Office (hours of use per v	week)	\$	
		Parking		\$ \$	
		Tools and /or Equipment <\$300)	\$ \$	
	Tools and / or Equipment >\$300			Υ	
		Description:			
		Date purchased:			
		Amount:		\$	
	Other (give details)				
		,			

School Building Fund Donations • Donations to Charity (NOT Art Union Tickets) Tax Agent's Fee Travel to Tax Agent last year Engine size up to 1600cc 1601-2600cc Over 2600cc Income Protection Insurance Self-education expenses relating to receipt of Youth Allowance YES/NO (attach details) Expenses in relation to any allowances received (attach details) YES/NO Business Expenses (attach details) YES/NO • Interest paid on funds borrowed for investments (attach details) YES/NO • Asset disposals (attach full details) YES/NO Superannuation paid by self employed (include Fund name, ABN number and your Policy Number) YES/NO • Forestry managed investment scheme deduction (attach details) YES/NO Any other expenditure relating to your work that you wish to speak to our Accountants about. YES/NO If Yes, please specify: **REBATES** please tick Medical Expenses. Did your family have <u>NET</u> (after Health fund and Medicare reimbursements) medical expenses over \$2,060? (If YES, provide details) YES/NO Place / Town No. of days resident Zone Spouse Superannuation Contributions **EDUCATION EXPENSES** The Australian Government announced in the 2012 Budget that the Education Tax Refund (ETR) would be replaced by a new payment called the Schoolkids Bonus. This means that you are no longer able to claim the ETR for 2011/2012. The ETR for 2011/2012 will be paid out in full to all eligible families as a one-off payment starting from 20 June

OTHER DEDUCTIONS

Assistance Office on 13 61 50.

2012. If you did not receive a one-off payment you can contact the Department of Human Services Family

OTHER INFORMATION



MEDICARE LEVY: Did you and all your dependants have private hospital cover for the entire year? (If yes, include the annual tax advice from your fund)	YES/NO				
<u>SUPER CO-CONTRIBUTION</u> : Did you make an after –tax personal contribution to super in the 2011/2012 year?	YES/NO				
CHILD SUPPORT : Did you or your spouse pay child support in the 2011/2012 year?	YES/NO				
If yes, how much was paid? Spouse					
HECS DEBT at 30 June 2012?	YES/NO				
You can arrange to have your refund credited direct to your bank account provided our fees have been paid and you provide your account details.					
Same bank details as last year? YES / NO (If no please specify below.)					
BSB ACCOUNT NO ACCOUNT NAME					
I confirm that the above information is correct and that where necessary I hold documentary evidence in support of my claims.					
Client Signature Date					