

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 _____
 EMAIL _____ OCCUPATION _____
 PHONE (W) _____ (H) _____ (M) _____

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

OTHER DEDUCTIONS



- School Building Fund Donations \$ _____
 - Donations to Charity (NOT Art Union Tickets) \$ _____
 - Tax Agent's Fee \$ _____
 - Travel to Tax Agent last year _____ kms
- Engine size up to 1600cc
 1601-2600cc
 Over 2600cc

- Income Protection Insurance \$ _____
- Self-education expenses relating to receipt of Youth Allowance (attach details) YES/NO
- 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 NET (after Health fund and Medicare reimbursements) medical expenses over \$2,060? (*If YES, provide details*) YES/NO
- Zone Place / Town _____ No. of days resident
- 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 2012. If you did not receive a one-off payment you can contact the Department of Human Services Family Assistance Office on 13 61 50.

OTHER INFORMATION



MEDICARE LEVY:

Did **you and all your dependants** have private **hospital** cover for the **entire** year? YES/NO
(If yes, include the annual tax advice from your fund)

SUPER CO-CONTRIBUTION: 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