

Tax Return Checklist 2015

Information Required	Information Provided	Not Applicable
Please provide your bank details for tax refund (if applicable) i.e. BSB, Account		
No. and Account Name (the ATO has made it mandatory for ALL refunds to be		
deposited into a bank account. If you don't supply a bank account, then we are		
unable to complete your return.		
Income:		_
PAYG summaries from employers, Centrelink and/or Superannuation		
Funds	п	п
Lump Sum payments (for example Employment Termination Payments) Part Contract of Transition Interest in the contract of		
Bank Statements & Term deposits detailing interest earned Income Received from Investments:	п	П
Managed Fund Annual Tax Statement including Capital Gains Statement		
Dividend Statements including any Buy/Sell contracts for shares	п	
Receipt of any shares through an Employer Share Scheme		
Income Received from Rental Properties:		
Details of Property sold. If you have sold any property please be sure to		
bring ALL details of the PURCHASE and SALE		
Annual Statement from Property agent (if engaging the services of an)
agent)		
Work-related Deductions		
Details of depreciable assets bought during the year (e.g Laptops)		
including date purchased and cost.	_	_
Professional Memberships/ subscriptions/ Union fees		
Receipts for continuing professional development courses and seminars		
Receipts for Self Education expenses Receipts or oxidence of work related deductions such as protective.	П	п
 Receipts or evidence of work related deductions such as protective clothing, uniform expenses and travel expenses 		
Vehicle Log book for motor vehicle expenses <i>if applicable</i>		
Other deductions :		
Receipts for donations of \$2 and over to registered charities		
 Expenditure incurred in managing tax affairs (e.g tax agents fees) 		
Expenditure incurred in earning investment income (e.g interest paid,		
subscriptions)		_
Income protection insurance premiums		

Rental Property:		
 Annual Statement from Property agent (if engaging the services of an agent) including any expenses incurred which are not detailed on the property agent annual statement, such as water charges, land taxes and incurance promiums. 		
insurance premiums		
Loan statements for property showing interest paid for the income year Desired property was repted out during the income year.		
Period property was rented out during the income year Outside of decreasing the country to		
 Details of depreciable assets bought or scrapped during the year Date when property as purchased 		
 Date when property as purchased If the property was held by more than one individual please provide 		
details of owners and their legal ownership percentage		
If property was disposed of during the income year, information relating	п	
to dates and costs associated with the acquisition and disposal of the)
property (settlement statements from solicitor)		
Offsets and Rebates		
Private Health Insurance statements for yourself and your partner		
IMPORTANT NOTE: We CANNOT complete your return if this is not provided.		
 Details of any super contributions for spouse 		
 Details of dependants including their age, occupation and income 		
The Net medical expenses Tax Offset is being phased out and 2015 will be the last year it will be able to be claimed. Only those who claimed NMETO in 2013/14 will be able to claim in the 2014/15 year. These offsets apply to all medical expenses.		
The only exception is for taxpayers who have net medical expenses relating to disability aids, attendant care or aged care expenses. These can be claimed regardless of whether you received the Net Medical Tax Offset your 2013/14 tax assessment.		
For the 2015 tax year the ATO income testing for the claim of the net medical tax offset for taxpayers with an adjusted taxable income ATI above: • \$90,000 if you are single, or • \$180,000 if you are partnered or a family.		
The family threshold will increase by $$1,500$ for each dependent child after the first.		
If your ATI is above these thresholds, you can only claim an offset of 10% of your net medical expenses over \$5,233.		
If your ATI is below these income thresholds, you are not affected by this change and you can claim an offset of 20% of your net medical expenses over \$2,218.		
Other information:		
 If you have any doubt about any income or expenses you've received or incurred bring the documents with you. Have you made any payments to your superannuation funds that are eligible for the Super Co-contribution? 		0 0
Have you paid any Child support?Any other information you think is relevant?) [
- Any other information you tillik is relevant:		