



Tax agent
25955591

INDIVIDUAL TAX RETURN CHECKLIST

If you are meeting with us to discuss your individual tax return, or if you are sending your records to us, this checklist will assist you in providing the relevant information and supporting documentation we need.

Please note that all of the items in this checklist may not apply to your circumstances. There may also be other issues outside of this checklist that will apply to your circumstances.

New client to KF & Associates:		<input checked="" type="checkbox"/>
Provide a copy of your most recent lodged tax return. If the return was prepared by another accountant and you do not have a copy, we can request one from your former accountant.		<input type="checkbox"/>
Complete our New Client Details form If you don't already have a copy, click here to fill up the form		<input type="checkbox"/>
If you are an existing client to KF & Associates		<input checked="" type="checkbox"/>
Provide details, if your situation and contact details changed?		<input type="checkbox"/>
New Mobile		New email
Just Married		New baby
		Seperated
New address		
New Bank A/C	BSB:	Account Number:
New Job Title		
Other (Details)		
Income		<input checked="" type="checkbox"/>
Salary & Wages Copies of Payment Summaries or STP has finalised?.		Yes <input type="checkbox"/>
		No <input type="checkbox"/>
Australian Government Allowances & Pensions Annual summaries from Department of Human Services ready.?		Yes <input type="checkbox"/>
		No <input type="checkbox"/>



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Income	✓
Bank Interest Summary of interest earned.	<input type="checkbox"/>
Dividends Dividend statements.	<input type="checkbox"/>
Trust Distributions Copies of Annual Tax Summaries for Managed Investments.	<input type="checkbox"/>
Capital Gains Details of assets sold (shares, managed funds, real estate etc): <ul style="list-style-type: none"> ○ Purchase details (contracts, settlement statements, other purchase costs). ○ Sale details (contracts, settlement statements, other sale costs). 	<input type="checkbox"/>
Deductions - Supporting documents	✓
Work related car expenses <ul style="list-style-type: none"> ● Details of Car (make, model, date purchased, cost, registration number, engine capacity), and ● Log book details and relevant expenditure (fuel, registration, insurance, repairs etc), or ● Work related kilometres travelled. 	<input type="checkbox"/>
Work related travel expenses Other work related travel expenses (air, bus, train, tram, tolls, parking, car hire).	<input type="checkbox"/>
Work related uniform and laundry <ul style="list-style-type: none"> ● Protective clothing. ● Compulsory uniform (non-conventional clothing strictly enforced by employer). ● Non-compulsory uniform (registered logo with AusIndustry). ● Occupation specific clothing (e.g. Nurses, Doctors, Chefs.). ● Laundry expenditure. 	<input type="checkbox"/>
Work related self-education Education expenses incurred to gain a formal qualification from a school, college university or other place of education: <ul style="list-style-type: none"> ● Tuition fees. ● Travel costs (both domestic and international). ● Textbooks, stationery, student union fees, electronic devices. 	<input type="checkbox"/>
Interest and Dividend deductions <ul style="list-style-type: none"> ● Details of expenses incurred in earning interest and dividend income (e.g. interest on borrowings, broker fees etc). 	<input type="checkbox"/>



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Deductions - Supporting documents		✓
<p>Other work related expenses</p> <ul style="list-style-type: none"> Professional memberships, union fees etc. Seminar, conference or education workshop expenses. Overtime meal costs. Tools and equipment, electronic devices, professional libraries etc . Home office expenses (phone, internet etc). 	<input type="checkbox"/>	
<p>Interest and Dividend deductions</p> <p>Details of expenses incurred in earning interest and dividend income (e.g. interest on borrowings, broker fees etc).</p>	<input type="checkbox"/>	
<p>Gifts or Donations</p> <p>Details of donations of \$2 or more. (Able to provide the receipt)</p>	<input type="checkbox"/>	
<p>Tax related expenses</p> <p>Payments to tax agents.</p>	<input type="checkbox"/>	
<p>Other Deductions</p> <p>Income protection insurance premiums.</p>	<input type="checkbox"/>	
Tax Offset /Medicare/Spouse Details		✓
<p>Net Medical Expenses Offset</p> <p>Details of net out of pocket medical expenses for yourself, spouse and dependants:</p> <ul style="list-style-type: none"> Annual summary from private health insurer and Medicare Payments to qualified Medical Practitioners for non-cosmetic procedures (e.g. surgical, dental, optical, physiotherapy etc.). Any other out of pocket medical expenses (prescriptions, medical aids) 	<input type="checkbox"/>	
<p>Private health insurance</p> <p>Copy of annual statement for private health insurer.</p>	<input type="checkbox"/>	
<p>Spouse Details</p> <p>Where Parramatta Accountant's is not engaged to prepare your spouse's tax return:</p> <ul style="list-style-type: none"> Name and Date of Birth. Their taxable income. 	<input type="checkbox"/>	

If you have any supporting documents to send to us?
 Or, if you need more assistance or discuss your situation?
 Please email to us and we will contact or respond to you within 24 hour.
accounts@theassociates.com.au