

General Tax Return Checklist - 2015

- please complete and bring to your appointment

Your Name: _____

If you don't need to lodge a tax return – please let us know so that we may advise the ATO.

The ATO still needs notification regardless.

Have you changed your contact details (ie, have you moved address or changed your postal address)?

_____ [new address details, if applicable] Y N

Does your spouse (if applicable) have their return prepared at our office? If not, please bring a copy of your spouse's PAYG payment summary/(ies), or the taxable income as per their tax return. **Medicare surcharge rules have changed substantially, and it is important for us to correctly disclose your spouse's income to correctly estimate your Medicare Levy.**

Y N

Have your bank account details for refund purposes changed from last year? Do we have your bank account details to facilitate receipt of your refund? Please complete the following fields:

Acct Name _____

BSB _____ Acct No. _____

Do you have private health insurance? If "Y" please bring the statement from the Health Fund which will display the entitlement to Health Insurance rebate.

Y N

Would your family be out of pocket more than \$2,162 or \$5,100 in medical expenses?

Y N



If yes, please obtain statements from Medicare and your private health insurance provider, and pharmacies/chemist - PRIOR to making the appointment to have your tax return prepared. If you have a MyGov account, this should be much easier than in previous years.

Have you worked for more than 1 employer during the financial year? **If yes, please bring all** relevant payment summaries

Y N

Have you earned any bank interest? Please double check savings & term deposits and accounts closed during the financial year.

Y N

Bank _____ BSB _____ Acct No _____ \$ _____

Bank _____ BSB _____ Acct No _____ \$ _____

Payments from Centrelink? Centrelink will not be issuing Payment Summaries this year. We will rely upon the data supplied by Centrelink to the ATO.

Y N

Did you pay any Child Support during the year? If so, please bring a total of the Child Support paid.

Y N

Did you receive any other income from any other source in any country worldwide? Y N


Share dividends – use dividend summary sheet – and bring your cost base records so we can update for DRPs, etc

Trust/fund distributions – bring (all) the annual tax statement(s) issued by the managed fund(s)

If any other sources of income, bring details & all associated paperwork Y N



eg – sale of boat or motor vehicle or art work or jewellery; insurance payout; inheritances; redemption of managed funds or sale of shares

Have you used your personal vehicle for work related purposes? 
No of Kilometres _____ **Engine Capacity (size)** _____ (litres or cc's) Y N

Did you have to do any other travel for work related purposes where you have incurred costs for airfares, accommodation etc?* **If yes, please provide details.** Y N

Have you undertaken and paid for work-related study? **If yes, please bring your receipts.** Y N

Have you used a home office? If applicable, seek the home office worksheet at www.ctcaccounting.com.au/home/resources.
 Number of hours for the year - _____ hrs Y N

Do you wear a uniform emblazoned with your employer's logo? Y N

Have you made any donations to charitable organisations? **If so, please bring your receipts** Y N



Did you incur any of the following expenses in earning your income? **If so, please bring receipts & your summaries of the totals of expenses**

Trade Union	\$ _____	Internet fees	\$ _____	Sun Protection?	\$ _____
Registrations	\$ _____	Stationery	\$ _____	Tools of Trade	\$ _____
Telephone (mobile/landline)	\$ _____	Seminars & Conferences	\$ _____	Protective clothing or equipment	\$ _____

Apportionment: Where expenses have both private and business usage, the necessary records to verify the business usage claim (ie, support the apportionment for business/employment usage) **must be readily available.**

*** Please remember the golden rule: no receipt, no deduction. ***



* Would your employer be willing and able to supply a letter confirming the requirement to use your personal car/incur these costs pursuant to course of earning your assessable income during the tax year? Gosh, I hope so for your sake!