

# TAX RETURN CHECKLIST

Please complete and send with your supporting documents to [taxreturn@barkersmith.com.au](mailto:taxreturn@barkersmith.com.au) or fax to 08 9301 4566.

<p><b>Income</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Payment Summaries (group certificates)</li> <li><input type="checkbox"/> Centerlink Payments (Newstart, Austudy, Parenting, Pensions etc)</li> <li><input type="checkbox"/> Other Pensions (Both Foreign and Australian Superannuation)</li> <li><input type="checkbox"/> Interest from Bank Accounts</li> <li><input type="checkbox"/> Investment Income Summaries</li> <li><input type="checkbox"/> Share Dividend Statements</li> <li><input type="checkbox"/> Sale of Shares (with purchase info)</li> <li><input type="checkbox"/> Lump Sum and Termination Payments</li> <li><input type="checkbox"/> Income from Partnerships/Trusts</li> <li><input type="checkbox"/> Foreign Income (inc Bank Interest)</li> <li><input type="checkbox"/> Any Other Income from any source</li> </ul> <p><b>Deductions</b></p> <p><b>Work Related Vehicle</b> (does not include travel to and from place of work for employees)</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Log Book (with fuel receipts etc)</li> <li><input type="checkbox"/> Actual mileage recorded (limited to 5000km), no log book required</li> </ul>	<p><b>Work Related Uniform</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Purchase of uniform with logo</li> <li><input type="checkbox"/> Purchase of protective clothing/boots</li> <li><input type="checkbox"/> Laundry/Dry Cleaning of uniforms</li> <li><input type="checkbox"/> Sun Protection for outdoor workers (Hats, glasses, sunscreen etc)</li> </ul> <p><b>Self Education</b> (related to current job)</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Course Fees Paid (Uni, TAFE etc)</li> <li><input type="checkbox"/> Textbooks</li> <li><input type="checkbox"/> Computer, Printer, ink, paper etc</li> <li><input type="checkbox"/> Stationery, Photocopying etc</li> <li><input type="checkbox"/> Travel (log book or actual mileage)</li> <li><input type="checkbox"/> Seminars/Workshops (not held at an educational institution)</li> </ul> <p><b>Other Work Related Expenses</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Home office (hours/wk or actual cost)</li> <li><input type="checkbox"/> Computer (business % only)</li> <li><input type="checkbox"/> Home/Mobile Phone (business % only)</li> <li><input type="checkbox"/> Tools and Equipment</li> <li><input type="checkbox"/> Union Fees and memberships to professional associations</li> <li><input type="checkbox"/> Subscriptions to Journals/Magazines</li> </ul>	<p><b>Gifts and Donations</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Receipts for donations to charities and registered building funds.</li> </ul> <p><b>Miscellaneous Items</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Tax Agent's Fees from last year</li> <li><input type="checkbox"/> Medical Expenses over \$1500 (include all family prescriptions, hospital, dental etc less rebates from Medicare/Private Health Fund) No cosmetic procedures</li> <li><input type="checkbox"/> Private Health Fund Statement</li> <li><input type="checkbox"/> Income Protection Insurance (not life)</li> <li><input type="checkbox"/> Remote Zone Worker (more than 182 days in remote zone)</li> <li><input type="checkbox"/> Education Tax Rebate</li> </ul> <p><b>Rental Property</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Income (rent received)</li> <li><input type="checkbox"/> All expenses (inc advertising, agents fees, council rates, land tax, interest on loan, repairs, water charges, gardening, cleaning etc)</li> <li><input type="checkbox"/> Loan set-up fees etc (for new loans)</li> <li><input type="checkbox"/> Depreciation Report for new rentals</li> </ul>
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**Important Notes:**

1. Where an expense has a private portion (eg Home Telephone or Home Computer) then only that percentage that relates to work use can be claimed based on records of *actual* usage.
2. Some Items (eg computers and tools greater than \$300) must be claimed over a number of years (depreciated).
3. Receipts and other evidence must be kept for *five* years from the date of lodgement of your tax return.

Your Name:

Your e-mail address: