

2011 INDIVIDUAL TAX RETURN CHECKLIST

If you require more copies of this checklist please contact our office or visit to our website
www.byfordaccountants.com.au

Please tick where applicable

INCOME:

1. **Job Description:** You: _____ Spouse: _____
2. **Group Certificates:** (including pensions) **Please attach all copies of your certificates.**
Number of certificates attached: _____
3. **Meal Allowance:** How much were you paid per meal? _____
4. **Vehicle & Travel Allowance:** How much were you paid? _____ per km / day (please circle)
5. **Termination Payments:** (If you received a lump sum termination, please provide the ETP Statement)
6. **Interest:** (money received on your bank accounts or accounts held in trust for children)

Name of Bank	Account No.	Branch	Total Interest Received \$	TFN Withholding \$	Is this a Joint Account?

7. **Dividends:** Please provide copies of dividend statements of income received. Please note: If you have chosen a **dividend reinvestment plan (DRP)** which means you don't physically receive any money, instead the fund uses that money to buy you more shares, it is still income and must go in your return
8. **Trusts and Partnerships:** (i.e. example of trusts is BT funds, Merrill Lynch, AXA etc.). **Please provide documents to show income from the funds.**
9. **Rental Income:** Please provide a summary of the income earned. _____
10. **Capital Gain:** Did you sell any assets such as **shares or property** that were acquired after 20 September 1985?
If applicable, please provide documentation of when it was purchased / cost and documents on sale / funds received (For example the final settlement statements) for each event.
11. **Foreign Income:** (Including foreign pensions) Please provide details of the income earned.

12. **Any Other Income:** (Please provide details of any income you received in the financial year that does not fit into any of the above categories. For example, Director's fees, Partner's salaries, Tips, Commissions, Income Protection Payments, Jury Duty, other Contract Income.)

DEDUCTIONS: *Please ensure you are able to substantiate all claims.*

1. **Motor Vehicle:** Did you use your personal car for work purposes through the year?
(This can include travel incurred whilst attending work related seminars or training courses and travel between a first and second job. Travel to and from work is **not** claimable unless you are required to carry heavy equipment)

Yes No (If yes, please complete one of the following options)

Log Book Method – Business % use (please ensure you keep a log book for a continuous period of 12 weeks)

a. Please provide details of all expenses you incurred over the financial year including fuel, repairs / maintenance, registration / insurance etc.

b. If you have a loan/lease for the vehicle, please provide details of the interest you paid over the year and the cost of the car. If you have a hire purchase, please provide a copy of the purchase contract.

Kilometres Method: You use your car for work, but have not kept a logbook. Let us know how many kilometres you would have travelled for work. The maximum the tax office allows you to claim is 5000 kilometres per car.

Kilometres Travelled : _____

Car Model & Engine Size: (in litres i.e. 1.6 litres): _____

2. **Travel:** Do you have any out of pocket expenses for work related travel (i.e. Accom, Parking, Fares)

3. **Work Uniform:** Do you have to wear a logo uniform or protective / safety wear?

Yes No

If yes, were you out of pocket through the year for purchasing any new items? (Please provide details).

4. **Self Education Costs:** Did you incur educational costs directly related to you current employment?

Yes No

If yes, please provide further details of these expenses: Institution: _____

5. **Other Work Related Deductions:** (Please provide the amounts that you would like to claim and a copy of the receipt for individual items over \$300 each)

Diary \$ _____ Stationery \$ _____ Work materials \$ _____ Tools \$ _____

Home Office Expenses: Internet \$ _____ Phone \$ _____ Power \$ _____

Computer/Laptop Expenses: \$ _____ Other Equipment \$ _____

Union fees \$ _____ Professional memberships \$ _____ Description _____

Income protection insurance (**Life insurance is not deductible**) \$ _____

6. **Donations:** (Raffle tickets, item purchases and lucky numbers are NOT deductible).
 \$_____ description _____ \$_____ description _____
 \$_____ description _____ \$_____ description _____
 Voluntary school building fund payments _____

7. **Other:** (Any costs you incurred that were directly related to your job). Please provide details.

REBATES & OTHER:-

1. **Private Health Insurance:**
 Do you have private health insurance? Yes No
 (Please provide a copy of the 2011 annual health fund statement)
 Does your health insurance cover both you & your spouse? Yes No

2. **Education Rebate:**
 Did you or your spouse receive Family Tax Benefit **part A**? Yes No
 Please state the name of the individual receiving this payment: _____

Please complete the table below for each eligible child and provide receipts to support your claims.

Dependant's Name					
Primary or Secondary (Please circle)	P / S	P / S	P / S	P / S	P / S
Total expenditure on:	\$	\$	\$	\$	\$
Uniforms					
Computer related expenses					
Computer related equipment					
Home internet connection					
Computer software					
Stationery, textbooks and other learning materials					
Total eligible expenses					

3. **Medical Expenses:** You may be entitled to a rebate if your out of pocket expenses on medical exceeds \$2,000. (This means, if you are in a private health fund, the portion of expenses that you do not get back.) Please provide a summarised total of your expenses from Medicare & your private health fund, for prescriptions contact your chemist.

4. **Spouse**

- Did you have a spouse for the full financial year? Yes No
- Did your spouse earn less than \$6000? Yes No
- Does your spouse receive any benefits from Centrelink? Yes No
- If we will not be preparing your spouse's return,
Please record their taxable income: \$ _____

Details of Centrelink benefits: _____

5. **Superannuation & Co-Contributions:**

- a. Have you made personal superannuation contributions in order to receive the government co-contribution? Yes No
- b. Have you made a contribution to your spouse's superannuation fund on their behalf? If yes, please provide details of this event.
- c. Are you self-employed? If yes, please provide details of contributions you made to your superannuation fund for the financial year.

6. **Zone Rebate:** If you worked away from home within this year, you may be eligible for a zone rebate. Please provide the details of where you were situated & the dates for which you were positioned here:

Location	Start date of posting	Finish date of posting

7. **Child Support:**

Did you or your spouse pay child support during this financial year? Yes No

Please provide the amount of total payments made: You: _____ Spouse: _____

8. **Rental Property Expenses:** Please provide a summary of these expenses (This can usually be obtained directly from your property manager for a small fee). Please provide invoices for any large items costing over \$300 (i.e. Fencing, Cupboards, Blinds)

Advertising for Tenants	_____	Cleaning	_____
Body Corporate Levies	_____	Council Rates	_____
Phone Calls & Rental	_____	Pest Control	_____
Gardening / Lawn mowing	_____	Land Tax	_____
Insurance (Building, Contents etc.)	_____	Electricity / Gas	_____
Repairs & Maintenance	_____	Stationery & Postage	_____
Interest & Bank Charges (please provide your loan statements)	_____	Property Agent Fees	_____

9. **Rental Property Travel:** Please provide details of costs incurred to inspect your property for example the distance travelled and the model & engine size of your vehicle.
