

2017 PERSONAL TAX RETURN CHECKLIST

Tax Returns can be completed by AccountingHQ as follows;

1. Tax Return Express

Complete the form below and **post, email, fax** or **drop in** your information to us. Your accountant will contact you when preparing your return with any queries or explanation of the result, and to arrange your signature.

2. Appointment with an Accountant

Contact your preferred location to arrange an appointment.

Moonee Ponds : **p** 03 9370 8088 **f** 03 9370 4521

Airport West : **p** 03 9338 2111 **f** 03 9330 2737

OR

Email : info@accountinghq.com.au

Please use the following information and checklist to assist us in processing your tax returns

Name: _____

Residential Address: _____

Postcode: _____ Date of Birth: _____

Contact Number: _____ Tax File Number: _____

Email: _____

Notes - e.g. Specific deductions, New job description, etc.:

BANK DETAILS FOR YOUR TAX REFUND

BSB: _____ **A/C NO:** _____

A/C NAME: _____

Please Note: In an effort to contain our fees, Trust Account facilities are only available in very limited circumstances; in these cases an administration fee will be charged.

Payment of our Invoice is required prior to lodgement of your Tax Return.

Our Preferred Methods of Payment:

1. Cash / Cheque (made payable to AccountingHQ Pty Ltd)
2. EFTpos / Funds Transfer (Chq or Savings A/c)
3. Credit Card (1% Surcharge applies)

Income Records

PAYG Payment Summaries.	<input type="checkbox"/>
Termination Payments (ETP) and Super Lump sum payment summaries.	<input type="checkbox"/>

Other Income

Income Streams. Payment Summaries and Tax Information Schedule.	<input type="checkbox"/>
Centrelink or Veteran Affairs benefits	<input type="checkbox"/>

Investments

Details of assets sold during the year e.g. shares, property. Include purchase and sale information and dates for Capital Gain or Loss calculations.	<input type="checkbox"/>
Investment statements. Dividend and Interest statements, bank books, trust and partnership distributions, managed fund summaries.	<input type="checkbox"/>
Rental income details. Address of property, purchase date, date first rented, real estate agent statements.	<input type="checkbox"/>
Foreign source income. Include details of any foreign tax paid, or foreign tax credits.	<input type="checkbox"/>
Employee Share Scheme statements	<input type="checkbox"/>

Expense Records

Work Related Expenditure

Motor vehicle (receipts and log book or record of klms)	<input type="checkbox"/>
Travel (Taxis, tolls, parking, etc., whilst on work duties)	<input type="checkbox"/>
Tools	<input type="checkbox"/>
Self-education fees, books, stationery, etc.	<input type="checkbox"/>
Clothing (protective or uniform related)	<input type="checkbox"/>
Subscriptions, union fees, publications	<input type="checkbox"/>
Telephone, internet, computer and home office expenses	<input type="checkbox"/>

Investment Property Expenses

Tax Depreciation Schedule. Depreciation can be a huge deduction. <i>Ask us how to arrange this if you do not have one.</i>	<input type="checkbox"/>
Interest payments / Loan statements.	<input type="checkbox"/>
Management Fees. Property Manager statements listing agent fees, advertising expenses, repairs and other outgoings.	<input type="checkbox"/>
Other Rental Expenses: Rates, insurance, body corporate fees, repairs, capital improvements, land tax, cleaning, gardening, etc.	<input type="checkbox"/>

Other Expenses

Donations (registered institutions only) Note: raffle tickets & purchases not deductible	<input type="checkbox"/>
Personal superannuation contributions (where no mandatory support provided)	<input type="checkbox"/>
Income Protection Insurance premiums	<input type="checkbox"/>
Cost of Managing your Tax affairs	<input type="checkbox"/>

Rebate Claims

Private health insurance tax statement	<input type="checkbox"/>
Income and deductions for dependents	<input type="checkbox"/>
Medicare levy exemption certificates where applicable	<input type="checkbox"/>

NB:

SPOUSE DETAILS:

It is recommended for couples that both returns be prepared together to enable accurate recording of spouse income details.

ATO NAME CHANGE REQUIREMENTS:

If your name has changed it will no longer be automatically updated via the tax return. You should contact the ATO on 132861 and update your details from documentary evidence otherwise your return will be delayed.