

INFORMATION REQUIRED FOR INDIVIDUAL TAX RETURN



Income

- Payment Summaries including any from Centrelink or Veteran Affairs
- Allowances, earnings, tips, director's fees etc
- Employer lump sum payments
- Termination Pay [please provide ETP statement]
- Australian annuities and superannuation income streams
- Investment income [interest from bank accounts, dividends, Trust and Partnership distributions, rental property income and net capital gains]
- Foreign source income [including foreign pensions] and foreign assets or property
- Information on dividends/shares purchased or sold [statements as at 30 June]

Work Related Expenses

1. Work related Car Expenses
Please supply details of kms if travelled below 5000kms. Log book and detailed list of expenditure including capacity of vehicle is required if claiming greater than 5000kms
2. Work related Travel Expenses
Please provide details of any work related travel expenditure [travel, accommodation, food etc] which were not reimbursed
3. Work related Uniforms/Protective Clothing
Receipts for protective clothing, boots, shoes, laundry expenses and uniforms
4. Work related Self-Education Expenses
Please provide description of course and any expenses incurred
5. Other work related Expenses
 - Union Fees & subscriptions
 - Telephone [including mobile] and internet
 - Home office expenses
 - Stationary bought for work
 - Sunscreens, sunglasses or hat
 - Tools and equipment
 - Computer usage & software
 - Camping supplies if you work out bush
 - Medicals if required to have one for work
 - Tour supplies if you are a tour guide eg CD's, reference books
 - Other work related expenses

Other Expenses

- Details/receipts for any gifts or donations greater than \$2.00
- Bank fees and management charges on interest bearing accounts in relation to investments only
- Non-employer sponsored superannuation details including name and policy number of fund and amount paid into fund
- Last year's Tax Agents fees [for new clients]
- Income Protection Insurance

Rebates/Offsets

If you are eligible to claim any of the following rebates please provide details for each

- Spouse's name, date of birth and taxable income [if applicable]
- Number of dependant children including names, date/s of birth, income earned
- Days spent in remote areas including place/location
- Parenting Payments [Centrelink]
- Sole parent – whole year/part of year [please provide dates if part of year]
- Superannuation paid for spouse
- Private Health Cover – please provide statement, member name and number
- Net Medical expenses after Medicare and health insurance reimbursements (Only relevant if eligible in 2013/14 income year)

Other Information

- HECS/HELP Debt? If so, how much?
- Student Loan? If so, how much?

Other Comments

.....

.....

.....

.....

.....

.....