# 2009 Individual Tax Return Checklist

RMGPARTNERS
BUSINESS & INSOLVENCY SOLUTIONS

Name of taxpayer: ______________________________

Address: ______________________________

______________________________

Preferred Contact No: ______________________________

| Information | Information Provided | Not Applicable |
|---|---|---|
| **Income** | | |
| PAYG summaries from employers, Centrelink and/or superannuation funds | | |
| Lump sum payments (eg Employment Termination Payment) | | |
| Trust distribution statement, including copy of the trust's tax return | | |
| Managed fund annual tax statement and capital gains tax statement | | |
| Partnership distribution statement, including a copy of the partnership's tax return | | |
| Dividend statements | | |
| Bank statements detailing interest earned | | |
| Term deposit statements detailing interest earned | | |
| Buy/sell contract notes for shares (if any shares were sold) | | |
| **Work-related Deductions** | | |
| Details of depreciable assets bought during the year (eg laptops) | | |
| Professional memberships/subscriptions | | |
| Receipts for continuing professional development courses and seminars | | |
| Receipts for self-education expenses | | |
| Receipts or evidence of work-related deductions such as protective clothing, uniform expenses and travel | | |
| Vehicle logbook for motor vehicle expenses (if using the logbook method) | | |
| **Other Deductions** | | |
| Receipts for donations of $2 and over to registered charities | | |
| Expenditure incurred in managing tax affairs (eg tax agent's fees) | | |
| Expenditure inccured in earning investment income | | |
| Income protection insurance premiums | | |
| **Rental Properties** | | |
| Annual statement from property agent (if engaging the services of an agent) | | |
| Date of when property was purchased | | |
| Details of depreciable assets bought or disposed during the year | | |
| Expenses (which are not detailed on the property agent annual statement) incurred, such as water charges, land tax and insurance premiums | | |

| Information | Information Provided | Not Applicable |
|---|---|---|
| If property is held by more than one individual, details of owners and their legal ownership percentage<br>If property was disposed off during the income year, information relating to dates and costs associated with the acquistion and disposal of the property<br>Loan statements for property showing interest paid for the income year<br>Period that property was rented out during the income year<br>Records detailing rental income (if not engaging the services of an agent)<br>Records of expenses relating to the property (if not engaging the services of an agent) | | |
| **Offsets / Rebates**<br>Details of any superannuation contributions for spouse<br>Details of dependants, including their age, occupation and income<br>Details of medical expenses where the total exceeds $1,500 (after Medicare and private health fund rebates)<br>Private health insurance statement (if insurance is held with partner, please state who is the primary holder and provide the age of partner) | | |
| **If Operating as a Sole Trader**<br>Cashbook, which includes records of drawings taken before the business takings are banked<br>Copies of Business Activity Statements lodged<br>Copies of PAYG summaries for employees<br>Details of any government grants, rebates or payments received<br>Details of superannuation contributions for employees<br>Payments of salaries and superannuation to associates<br>Records from accounting software (eg trial balance, P&L and and balance sheet)<br>Statements of all liabilities of the business<br>Superannuation contributions for self-employed persons | | |
| **Other Information**<br>Copies of Instalment Activity Statements lodged<br>If you have any doubt about any income or expenses you have received or incurred, bring the documents in with you<br>Any other information that you think is relevant | | |