

Individual Return Checklist

Income

	Provided	NA
Payment Summaries and Income Statements	<input type="checkbox"/>	<input type="checkbox"/>
Lump Sum Payments (eg. employment termination payments)	<input type="checkbox"/>	<input type="checkbox"/>
Partnership/Trust distribution statement	<input type="checkbox"/>	<input type="checkbox"/>
Government payment statements	<input type="checkbox"/>	<input type="checkbox"/>
Interest income	<input type="checkbox"/>	<input type="checkbox"/>
Dividend statements for dividends received or reinvested	<input type="checkbox"/>	<input type="checkbox"/>
Annual Tax Statements from Managed Funds	<input type="checkbox"/>	<input type="checkbox"/>
Buy/Sell contracts for shares	<input type="checkbox"/>	<input type="checkbox"/>
Employee share scheme statements	<input type="checkbox"/>	<input type="checkbox"/>
Documentation for foreign source income, assets or property	<input type="checkbox"/>	<input type="checkbox"/>

Work Related Deductions

	Provided	NA
Details of depreciable assets brought during the year	<input type="checkbox"/>	<input type="checkbox"/>
Motor Vehicle expenses or kilometres travelled	<input type="checkbox"/>	<input type="checkbox"/>
Uniform/Work wear expenses	<input type="checkbox"/>	<input type="checkbox"/>
Education and professional development expenses	<input type="checkbox"/>	<input type="checkbox"/>
Union, registrations, tools, subscriptions & memberships	<input type="checkbox"/>	<input type="checkbox"/>
Telephone, computer and internet expenses	<input type="checkbox"/>	<input type="checkbox"/>
Work related travel expenses	<input type="checkbox"/>	<input type="checkbox"/>
Charitable donations	<input type="checkbox"/>	<input type="checkbox"/>
Income protection insurance premiums	<input type="checkbox"/>	<input type="checkbox"/>
Expenses related to managing tax affairs	<input type="checkbox"/>	<input type="checkbox"/>
Additional super contributions (notice of intent to claim)	<input type="checkbox"/>	<input type="checkbox"/>
Expenses related to earning investment income	<input type="checkbox"/>	<input type="checkbox"/>



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Rental Properties

	Provided	NA
Date when property was purchased	<input type="checkbox"/>	<input type="checkbox"/>
Period property was rented out during the financial year	<input type="checkbox"/>	<input type="checkbox"/>
Records detailing rental income and expenses	<input type="checkbox"/>	<input type="checkbox"/>
Loan statements for property showing interest paid	<input type="checkbox"/>	<input type="checkbox"/>
Expenses such as water, rates and insurance	<input type="checkbox"/>	<input type="checkbox"/>
Details of depreciable assets purchased or sold	<input type="checkbox"/>	<input type="checkbox"/>
Details of any capital works or additions to the property	<input type="checkbox"/>	<input type="checkbox"/>
If property was sold during the financial year we will require purchase and sale documents, solicitor fees, settlement sheets, agents invoices and any other expenses related to the sale	<input type="checkbox"/>	<input type="checkbox"/>

Sole Trader Income

	Provided	NA
Details of invoices for financial year	<input type="checkbox"/>	<input type="checkbox"/>
Details on business related expenses	<input type="checkbox"/>	<input type="checkbox"/>
Copies of Business Activity Statements lodged	<input type="checkbox"/>	<input type="checkbox"/>
Copies of income statements for employees	<input type="checkbox"/>	<input type="checkbox"/>
Details of government grants, rebates or payments received	<input type="checkbox"/>	<input type="checkbox"/>
Details of superannuation contributions for employees	<input type="checkbox"/>	<input type="checkbox"/>
Details of any assets purchases, date and amount	<input type="checkbox"/>	<input type="checkbox"/>
Payments of salaries and super to associates	<input type="checkbox"/>	<input type="checkbox"/>
Records from accounting software	<input type="checkbox"/>	<input type="checkbox"/>
Statement of liabilities of the business	<input type="checkbox"/>	<input type="checkbox"/>
Notice of any super contributions for self-employed persons	<input type="checkbox"/>	<input type="checkbox"/>



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Offsets and Rebates

	Provided	NA
Details of any superannuation contributions for your spouse	<input type="checkbox"/>	<input type="checkbox"/>
Spouse or de-facto partners name, income and date of birth	<input type="checkbox"/>	<input type="checkbox"/>
Number of dependents	<input type="checkbox"/>	<input type="checkbox"/>
Private health insurance statement	<input type="checkbox"/>	<input type="checkbox"/>

Other Information

	Provided	NA
Copies of Instalment Activity Statements lodged	<input type="checkbox"/>	<input type="checkbox"/>
Bank account details	<input type="checkbox"/>	<input type="checkbox"/>
Any other information you think might be relevant	<input type="checkbox"/>	<input type="checkbox"/>



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