

Qtax Personal Tax Return Checklist



INCOME

- Payment Summaries
- ETP Payment Summaries
- Government Payments & Pensions
- Superannuation Payments
- Bank Interest Received
- Dividends from Shares
- Employee Share Scheme Statement
- Partnerships/Trust Income
- Managed Funds Tax Statements
- Personal Service Income & Expenses
- Business Income & Expenses
- Capital Gains Tax Information
 - Purchase and Sale Records for Shares, Investment Property etc
- Foreign Income and Related Expenses
- Rental Property Income and Expenses
 - Agents Rental Statement
 - Depreciation Report
- Any other Income Received

DEDUCTIONS

- Donations
- Last Years Tax Preparation Fee
- Work Related Car Expenses
 - Log Book and Running Cost
 - Km's Travelled if up to 5000 km
- Work Related Travel - Overseas or Domestic
- Uniform/PPE
- Self Education - Relevant to Your Occupation
- Seminars
- Tools and Equipment
- Telephone/Mobile
- Internet
- Subscriptions
- Union Dues
- Reference Books and Resources
- Hours Spent Working from home
- Sun/Weather Protection
- Superannuation Contribution - If Self Employed
- Income Protection Insurance Premium
- Any Other Deductions

OTHER THINGS TO BRING

- Tax File Number
- Bank Account Details
- Private Health Insurance Tax Statement
- Spouse's Taxable Income
- Tax Free Government Pensions
- Child Support Paid
- Current Phone Number and Address
- Prior Year Tax Return for Items that Carry Forward
- Travel Diary
- Work/Home Office Diary

Smile, it's just tax. We make it easy!

Call 13000 - 4QTAX for your nearest tax agent

APPOINTMENT

Office:

Date:

Day:

Time:

If you provide information to us we are accepting that you have the proper paperwork/evidence to substantiate the claim. If you are unsure whether or not the records that you have kept are sufficient, contact QTAX to discuss whether or not you can make a claim.