

# Tax R Us Accounting

## Income Tax Return Checklist

<b>Income Records - Individual</b>	
<b>Group certificates ( PAYG Summaries )</b>	
<b>Bank Interest: Shown on your bank statement</b>	
<b>Investment income:</b>	
Share Dividends	
Managed Funds Tax statement	
Rental income and expenditure statement	
<b>Sale of assets:</b>	
Buy and sell contract	
<b>Business income records</b>	
<b>Foreign Investment Income</b>	
<b>Centrelink payments</b>	
<b>Tax Deductions - Work Related expenses</b>	
<b>Motor Vehicle</b>	
Evidence of distance travelled	
Log Book ( required if over 5000 km travelled)	
1/3 expense ( receipts and evidence )	
<b>Uniform / protective clothing</b>	
Laundry costs	
Evidence of items purchased	
<b>Self-Education Expenses</b>	
Course information	
Evidence of course cost	
Evidence of other associated travel	
<b>Other Work related Expenses</b>	
Subscription	
Sun protection	
Books and Journals	
Conference / Seminar	
Home office expenses	
Telephone cost	
Tools	

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<b>Tax Deductions - Other Deductions</b>	
Gifts / Donations	
Interest and dividend deductions	
Bank and management fees	
<b>Rebates</b>	
<b>Zone Rate</b>	
Days in remote area	
Location	
<b>Medical</b>	
Medical and Illness related	
Dentist	
Pharmacy / Chemist Receipts	
<b>Dependant Spouse</b>	
Spouse's taxable income	

## Sole Trader ( Business ) Income Tax Return Details

<b>General Information ( Income and Expense )</b>	
<b>Manual Cashbook</b>	
Cashbook	
Bank statements	
Cheque butts	
Deposit Slips	
Copy of Bank Reconciliation	
<b>Receipts for all business Purchases throughout year</b>	
Personal Superannuation Paid	
<b>Computerised Accounting System ( If Maintained )</b>	
Back up files	
<b>Details of New assets Purchased during the year</b>	
<b>Details of assets sold throughout the year</b>	
<b>Copy of loan statements</b>	
<b>Copy of new loans / hire purchase during the year</b>	

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<b>Employees</b>	
Copy of PAYG Summaries ( sent to ATO )	
Superannuation Contributions Paid to employee during the year	
<b>Stock on Hand</b>	
Stock on hand as of 30th June	
Stock write off details	
<b>Motor Vehicle</b>	
Motor Vehicle Related expenses	
Log Book	
Total Km Travelled	
Copy of all new Loans / Hire purchase during the year	

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