

ITR_Pre 30 June Checklist			
Client Name:		Financial Year:	
Name:		Spouse name:	
DOB:		Spouse DOB:	
Occupation:		Occupation:	
Residential address:		Postal	
ABN:			
TFN:		Email:	
Contact Details	Work:	Bank details:	Acc. name:
	Home:		Acc. no:
	Mobile:		BSB:
Dependents:	1)	3)	
	2)	4)	
PERSONAL INCOME TAX RETURN			
Supply all records with respect to the following:		Yes	No
PAYG payment summaries			
Government benefits			
Investment income (dividend statements, interest statements, trust distribution year end statements, rental property statements)			
Tax free government pension amount and any child support provided for the year if applicable			
Investment records – details of investment purchases and sales			
Private health insurance year end statement			
Net medical expenses tax offset, from the 2015/16 financial year until 2018/19 claims for this offset are restricted to net eligible expenses for			
For self employed, details of personal superannuation contributions			
Expenses in related to employment or investment income (a list of possible deductions is attached)			
Bank account detail for tax refund; e.g. BSB, account number and			
Document od overdue tax returns then lodgment date for your 30 June tax return is 31 October			
FOR NEW ASSET			
MOTOR VEHICLE DETAILS			
Vehicle description and cost:		Number of work related kilometers travelled:	Engine capacity (e.g. 3.0 ltr):
Business/work related use as per your log book:		Opening odometer reading:	Closing odometer reading:
Registration and insurance:		Repairs and maintenance:	Other:
RENTAL PROPERTY DETAILS			
Property details:		Acquisition Date: Acquisition Amount:	Has the loan for the property been renegotiated this year?:
Address of rental property:		Date property first earned rental income:	Number of weeks private use:
Ownership details: <input type="checkbox"/> In your name <input type="checkbox"/> In joint names (supply details) <input type="checkbox"/>		Number of weeks property was rented this year:	Owners and Percentage:
Disposal			
Disposal Date:		Capital Allowances recouped on disposal:	Capital Gain or loss on Disposal:
Income			
Rental Income:		Other rental income:	Total Rental Income:
		\$ \$ \$	

Expenses		
Advertising for tenants:	Legal Fees:	Travel expenses:
Body corporate fees:	Pest control:	Water Charges:
Borrowing expenses:	Property agent fees/commission:	Sundry Rental Expenses:
Cleaning:	Repairs and maintenance:	
Council rates:		
Capital allowance:		
Capital works:		
Gardening/lawn mowing:		
Insurance:		
Interest on loans:		
Do not sync interest on loans between all the co-owners as they have their own loan and interest costs? __YES or __NO		
Interest on loans - Hire purchases:		
Land tax:		
		<u>Total Expenses:</u>
<i>*For other properties please replicate this schedule.</i> <i>*For new property purchases include a copy of the settlement statement, details of costs of purchase including stamp duty and legal fees and details of borrowing expenses incurred.</i>		
POSSIBLE DEDUCTIONS YOU MAY CLAIM		
Work related car expenses - Log book method - Cents per kilometre method Work related domestic and overseas travel expenses Work uniform and protective clothing expenses Work related self-education expenses Other work related expenses Tools of trade/equipment Home office running expenses Computer equipment, software and computer supplies Telephone/mobile phone Stationery Subscription and union fees to trade, professional or business associations Books, trade journals and periodicals Magazine and newspaper subscriptions Sun protection products (i.e. sunscreen and sunglasses) Conventions, conferences, courses and seminars Income protection insurance (excluding death, total/permanent disability) Interest and dividend deductions (investment)		