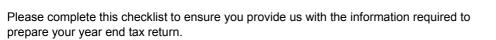
MGR ACCOUNTANTS 2015/2016 Individual Tax Return Checklist





If you have any queries relating to the points outlined below, please do not hesitate to contact our office.

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Information	Required	•
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Income/Receipts
Government pensions and allowances
Payment summaries for salary & wages
Lump sum & termination payments
Other pensions or annuities
Allowances
Interest received, including interest received from the ATO
Rent received
Dividends received, including foreign income
Distributions from partnerships or trusts, including managed funds
Life Assurance Bonuses/Friendly Society Bond Withdrawals
Details of any assets sold that were used for earning income, including date purchased and cost of purchase, date sold and proceeds received

Work related expenses

government benefits received

- □ Assets costing less than \$300 used to earn income will be eligible for an immediate deduction
 - Briefcases
 - Books & trade journals
 - Calculators, electronic organisers

Spouse's taxable income and details of any

- Software
- Stationery
- · Tools of trade
- □ Assets costing more than \$300 used to earn income will be able to be depreciated
- ☐ Travel expenses including accommodation, public transport costs & any meals purchased while travelling for work
- Overtime meal allowance claims

Uniforms or protective clothing purchased – uniforms
must be occupation specific or compulsory with logo or
registered to be deductible

- ☐ Other expenses associated with work-related clothing such as dry cleaning and laundry expenses
- □ Self-education expenses course fees, text books, stationery
- □ Union fees
- Subscriptions or memberships
- Seminar and conference fees
- ☐ Income protection and/or sickness and accident insurance
- Sun protection items
- Gifts or donations
- □ Home office expenses
- ☐ Interest and dividend deductions management fees, interest on borrowings, interest paid to the ATO or advice relating to changing investments
- Interest on loans for equipment or income earning investments
- Motor vehicle expenses (including a log book if claiming more than 5,000kms)
- Bridge/road tolls (work travel)
- ☐ Car parking (work travel)
- Award transport claims
- □ Rental property expenses

Advertising

Council/water rates

Insurance

Interest

Land tax

Agent fees

Repairs & maintenance

Telephone expenses

Travel to inspect the property

- Accounting fees
- ☐ Telephone expenses

Other

- Superannuation contributions
- ☐ Private health insurance tax statement
- Child Support Payment Details
- ☐ Details of any medical expenses relating only to disability aids, attendant care or aged care
- Changes in dependants
- Medicare Levy Exemption

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