

## PAG Accounting 2017 Individual Tax Return Checklist

### Income:

- PAYG payment summaries**
- Interest earned on bank accounts**
- Shares - dividends received** (This includes both cash and dividend reinvestment)
- Managed Funds - annual statement and any capital gains information**
- Rental Property - rental income for the year** (Annual agents statement if through an agent)
- Details of any participation in an Employee Share (or option) Plan or arrangement**
- Income from any trust, partnership or business** (if other entities not prepared by PAG Accounting)
- Centrelink income** (For example: pensions, newstart, youth allowance etc.)
- Foreign Income**

### Deductions:

- Motor vehicle** (This excludes to and from home to work). Please bring logbook if completed or KMs travelled
- Travel** (This includes train tickets, parking fees, accom etc. Overseas travel such as airfares, accommodation)
- Uniform and laundry** (This includes protective clothing and drycleaning)
- Self education** (This includes tuition fees, books, union fees and travel)
- Work related deductions** (This includes stationary, union fees, computer costs, mobile, internet, tools, home office costs, subscriptions, seminars, new assets such as computers, mobile phones)
- Donations**
- Interest paid on loans to purchase assets including shares**
- Rental property expenses**  
(This includes rates, repairs and maintenance, insurance, body corporate, interest etc.)
- Tax agent fees** - if not prepared by PAG Accounting last year
- Insurance** - Income protection insurance in individuals name is generally deductible
- Business records where you conduct your own business**
- Trauma and life cover** (not generally deductible)

### Other Items:

- Private health insurance (annual statement)**. We can not complete the tax return without this!
- Medical expenses** - only expenses relating to disability aids, attendant care or aged care
- Personal superannuation contributions**
- Taxable income of your partner/spouse**
- HECS/HELP liability**
- Child support paid**

### Sale of Assets - Capital gains:

- Asset sales such as shares/property** - if any sales during 2016/17 year please provide the sale amount and the purchase price of the asset. Also include brokerage, agents commission, stamp duty related to both the purchase and sale

### Comments & Other Information: