



Public Accountants & Financial Planners
P O Box 494
KENSINGTON NSW 1465

Ph: 02 9662 3333
Fax: 02 9662 3444

PERSONAL TAX RETURN CHECKLIST 2014/15

INCOME

Provide copies of relevant documents / details of all income received during the financial year including;

- Salary and wages – payment summaries (old group certificates)
- Centerlink payments – all support payments received
- Pensions – Old Age, Veteran Affairs, Private Superannuation etc.
- Interest received from all financial institutions
- Dividends received including dividend reinvestment plans

EXPENSES

Provide copies of all relevant documents including receipts for all relevant expenses during the financial year including;

- Last year's tax return
- Gifts / donations
- Interest
- Self education
- Seminars
- Tools and equipment
- School education – see our website for changes
- Uniforms
- Travel
- Telecommunication
- Subscriptions
- Union fees



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OTHER DEDUCTIONS

- Health insurance – include your annual tax letter from your health fund
- Rental Property Profit / Loss – complete a separate Rental Property Worksheet for each property owned (see our website for a copy) or bring in all of your receipts
- Work related car expenses – complete a separate Work Related Car Expenses Worksheet for each car (see our website for a copy) plus bring in your most recent log book if applicable and bring in all of your receipts
- Capital Gains – if you have sold an asset (shares, property, motor vehicle, boat) during the year complete a Capital Gains Worksheet for each asset sold (see our website for a copy) or bring in all of your receipts

OTHER ISSUES TO CONSIDER

H.E.L.P. Yes No

Comments: _____

PAYG tax instalments Yes No

Comments: _____

Taxable Payments Annual Report Yes No

Comments: _____

(Building and Construction Industry)