

TAX RETURN CHECKLIST FOR YEAR ENDED 30 JUNE 2015

Note: If Platinum Accounting & Taxation have not prepared your return previously, please attach a full copy of your previous year's tax return and any other relevant information from previous years.

- If you own a rental property, please refer to our **Rental Property Schedule**

PERSONAL DETAILS

Name:	Occupation:	
Phone No:	Mobile:	
Your Tax File Number:	Your Date of Birth:	
Email Address:		
Home Address:		
Postal Address:		
Full Name of Spouse:	Spouses Date of Birth:	
Date of Marriage (if married during the year):	Spouse Taxable Income 2015:	
<i>If Platinum Accounting & Taxation is not preparing your partners tax return, please provide us with their taxable income as their income may be required to be recorded in your tax return.</i>		
Your Bank Account Details (to receive any tax refund electronically)		
BSB (Must be 6 digits)	Account Number	Account Name

INCOME DETAILS

1. **Group Certificates** (including pensions & Centrelink) Yes No
 Number of certificates attached: _____

2. **Other Salary Income** (includes any directors' fees, commissions, tips etc.)

3. **Termination Payments** (if you received a lump sum termination payment please provide Eligible Termination Statement – ETP Statement)
 Applicable? Yes No

4. **Interest** (money received on your bank accounts)

Name of Bank	Account No.	Total Interest Received	TFN Withholding	Joint Account?
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No

5. **Dividends**

Please provide copies of dividend statements of income received. Also note that if on the dividend reinvestment plan (DRP) which means you don't physically receive dividends (the company uses that money to buy you more shares) that is still income and must go into your tax return.

Name of Shares	No. Shares Held	Amount Received

INCOME DETAILS

6. **Trusts Distributions and Partnership Income** (i.e. examples of trusts are public funds or unlisted/family trusts). Name of trust or partnership – Please provide documents including yearend Tax Statements to show income from the funds you list.

7. **Capital Gain** – Did you sell any assets such as shares or property which were acquired after 20 September 1985? If yes, then please attach documentation of when it was purchased, its cost, and any documents relating to its sale or the funds received.

Applicable? Yes No

8. **Rental Income** – Please attach details of the rent received and all expenses in their separate categories. A Rental Property Schedule is available from our website for your convenience.

Please supply settlement sheets and purchase documents for property.

Should you require the services of a Quantity Surveyor for a depreciation report please contact us for a referral of the firm we use.

List of rental properties, all information attached:

9. **Foreign Income**

Did you receive foreign income/salary? – please attach all relevant documentation. Yes No

Did you receive any Foreign Dividends? If yes, please provide statements. Yes No

10. **Any Other Income** (Any other income you received in the financial year which doesn't fit into any of the above categories – please provide details. Please refer to the **Income & Deductions Guide** available from our website www.platinumaccounting.com.au)

DEDUCTION DETAILS

Please ensure you are able to substantiate all claims.

1. **Motor Vehicle** – Did you use your own car for business/work purposes during the year? Yes No

If yes, then please provide information for either (a) or (b) below.

(a) **Log Book Method:** Business % use (please ensure you keep a log book for a continuous period of 12 weeks) Please provide details of all expenses you incurred over the financial year under the following categories:

Expense Type	Amount
Fuel	
Insurance	
Registration	
Services/Repairs	
Loan Interest or lease payments (if applicable) – if you have hire purchase or lease please provide the paperwork	
Other – please specify:	
Cost of vehicle and date of purchase Date:	

(b) **No Log Book:** Let us know how many business kilometres you travelled during the year (up to 5000 kms)

Kilometres: _____

DEDUCTION DETAILS

2. Work Uniform

Do you wear a logo uniform or require protective clothing? Yes No

If yes, please provide the costs associated with purchasing and maintaining the uniform, e.g. laundry (up to \$150 without receipts) cost of protective clothing such as work boots, sunscreen, hats, eye protection.

3. Donations

Yes No

Name of Body	Amount

4. Tax Agent Fees (from previous year): _____

5. Interest & Dividend Deductions

Description	Amount
Interest on dividend or other investment income	
Cost of investment advisor	
Reference Materials	
Other – please specify:	

6. Other Work Related Deductions – please provide details.

Description	Amount
Diary, stationery, work materials	
Union Fees / Professional Bodies	
Mobile phone	
Tools and equipment	
Seminars & short courses	
Income protection	
Subscriptions	
Other – please specify:	

7. Home Office Expenses – Do you work from home at any time? Yes No

If yes, please complete the table below. We will include a portion of these expenses on your tax return based on your percentage work related use.

Number of hours per week spent on work related activities at home: _____

Gas & Electricity: _____ % work related use: _____

Internet: _____ % work related use: _____

Home telephone/Fax: _____ % work related use: _____

Computer & office equipment purchased 2014/15: _____

Furniture in home office 2014/15: _____

Any other expenses that may be eligible? e.g. Files, cabinets, desk lamp, printing materials etc.

DEDUCTION DETAILS

8. Travel Expenses (Tolls, Parking, Meals/Accommodation for overnight work travel/Airfares/Vehicle Hire)

9. Other (Any costs that were directly related to your job – please provide details)

10. Self-education Expenses (includes seminar costs, text books, stationery, student union fees, course fees (except HECS/HELP), depreciable items used for self-education purposes e.g. Computer, Reference library)

TAX OFFSETS & REBATES

1. Do you have private health insurance? Yes No

If yes, please provide us with a copy of the health fund statement.

2. Superannuation

(a) Are you self-employed, if yes please provide details of contributions you made to your superannuation for the financial year.

(b) Have you made any personal contributions to your superannuation fund? If so you may be entitled to super co-contributions (conditions apply). We do not require any information for your tax return as the process to claim this is automatic between the Australian Taxation Office and your superfund upon lodgment of your tax return.

(c) Have you made superannuation contributions on behalf of your spouse? Yes No

3. Medical Expenses – You *may* be entitled to a rebate if your out-of-pocket expenses on medical exceeds \$2,218 subject to your amount adjusted taxable income **but only if** you claimed medical expenses in your 2013 and 2014 income tax returns.

Please provide a summarised total of your expenses (the out-of-pocket amounts only):
