

INDIVIDUAL TAX CHECKLIST 2015

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|---|--------------------------|
| Copy of prior year tax return (if not prepared by us) | <input type="checkbox"/> |
| PAYG Payment Summary/Group Certificate | <input type="checkbox"/> |
| Dividend Statements | <input type="checkbox"/> |
| Details of any share sales or purchases | <input type="checkbox"/> |
| Tax Statements from Managed Funds | <input type="checkbox"/> |
| Rental property information including:
Annual rental statement
Insurance
Rates
Interest
Depreciation | <input type="checkbox"/> |
| Gifts or Donations receipts | <input type="checkbox"/> |
| Details of interest earned on bank accounts | <input type="checkbox"/> |
| Phone, Electricity, Internet expenses | <input type="checkbox"/> |
| Car Expenses | <input type="checkbox"/> |
| Accounting Fees paid in 2014/15 | <input type="checkbox"/> |
| Private Health Insurance Tax Statement | <input type="checkbox"/> |
| Income Protection Insurance details | <input type="checkbox"/> |
| Any Other Deductions | <input type="checkbox"/> |
| Are you a maths, science, education or nursing graduate eligible for the HELP repayment benefit | <input type="checkbox"/> |
| Spouse's Taxable income and DOB (if we do not prepare their return) | <input type="checkbox"/> |