



TAX REFUND CHECKLIST

YEAR END 30 JUNE

“Big enough to make a difference... Small enough to care”

Would you also like a free quote or review of any of the following?

- Business Insurance
- Life & Income Protection
- Superannuation
- Social Security — Pensions/Annuities
- Investments

Level 1, 8 Innovation Parkway
Birtinya QLD 4575

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PO BOX 206
Mooloolaba QLD 4557

PERSONAL DETAILS

NAME:.....

SPOUSE'S NAME:

NAME(S) AND BIRTHDATES(S) OF CHILD DEPENDANTS(S):.....

RESIDENTIAL ADDRESS:.....

POSTAL ADDRESS:

PHONE NO:.....

EMAIL:

Checklist - Income

- Allowances/Benefits/Earnings/ tips etc
- Bonuses - Life Insurance etc
- Capital Gains - Shares, Real Estate
- Consultancy/Contract Income
- Dividends/Distributions
- Eligible Termination Payments
- Foreign Source Income
- Interest - Banks, Building Societies, Credit Unions
- Lump Sum Payments
- Partnership/Trust Distributions
- Private Health Insurance/Medicare
- Business Income
- Rent
- Salaries/Wages
- Social Security - Allowances, Unemployment Benefits, etc.
- Social Security - Pensions/Annuities
- Superannuation Statements
- Tax File Numbers (Including Spouse)

Checklist - Expenses

- Bank Account Fees and Debit Charges
- Car - Fuel/Oil, Repairs, Interest, Etc.
- Car Log Book
- Car Details
- Car Odometer Reading at 30th June
- Computer - Hardware and Software (include dates of purchase)
- Donations/ Gifts - prescribed Charities
- Home Office - Equipment, Contents Insurance, Pest Control, Carpet Cleaning, Estimated Number of Hours worked at home
- Insurance premiums - Business Insurance, Income Protection, Trauma
- Internet Charges
- Interest and Dividend Deductions
- Journals/Newspapers - work, investment-related
- Medical - Doctor, Chemist, Dentist, Hospital, Lab Fees, Optical, Physio, etc (if net amount > \$1500 in total)
- Professional Association, Union Fees
- Rental Costs - Advertising, Rates, Repairs, Cleaning, Travel etc.
- Self Education - Course Fees, books, Photocopying, Stationery, Travel, etc
- Seminar/Conferences
- Sun Protection, Sunglasses (if outside duties)
- Superannuation Statements (if not employed)
- Tax Advisor/Agent Fees
- Telephone - Calls and Rental Charges
- Tools of Trade - Depreciation, insurance, repairs, replacement
- Travel - Air, Bus, Taxi Fares, Accommodation, Meals, Parking, Travel Diary
- Uniforms/Protective Clothing - Purchase, Laundry, Dry Cleaning

