PO Box 1629, Morley WA 6943

admin@astrotax.com.au

www.astrotax.com.au

Contact us on 6262 8327, Stacey on 0419 916 038 or Ross on 0431 774 479

2018 TAX CHECKLIST: INDIVIDUALS

NAME:_____

TFN:_____

Email: _____

Address: _____

Phone: _____ **Mobile:** _____

Bank Details: BSB _____**ACC #** _____**(for electronic tax refunds)**

New Clients: Last year's Notice of Assessment and Tax Return (if available)

Income

PAYG Payment Summaries.

Income from business activities.

Details of any non-cash benefits received including discount(s) on employee shares or rights.

Lump sum and termination payments. All documentation should be provided including an ETP Payment Summary from the employer or fund.

Government payments, including pensions, unemployment and sickness benefits.

Details of any asset sales (e.g. shares, business and real estate). Please include dates of, and costs associated with, acquisition and disposal

Annuities, including allocated pensions or superannuation income streams.

Income from trusts and partnerships. Statements of distribution should be provided where appropriate.

Rental income.

Interest and dividends received and any tax deducted. Include details of franked dividends (i.e. imputation credits).

Foreign source (employment and pension) income and details of any foreign tax credits, assets or property.

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Deductions

- Investment and property expenses (carefully detail interest and repair claims), supply statements.
- Work-related subscriptions or memberships (not including sporting or social clubs).
- Employment related expenditure such as self-education, protective clothing, tools, union fees, uniform and laundry expenses.
- Motor vehicle expenses, car finance lease statements (include petrol, repairs, parking and log book where applicable).
- Donations of $2 and over.
- Income Protection Insurance Premiums.
- Details of any personal Superannuation Contributions made.
- Home office expenses where employment requires use of your computer, phone or other device.
- Tax Agent Fees and other accounting/tax audit fees.
- Special deductions (Australian films, investment shelters and agribusiness-type schemes).

Other

- Private health insurance annual statement.
- Details of superannuation contributions where no tax deduction can be claimed.
- Details of superannuation contributions paid by your employer for the year (if over and above the 9.5%)
- Any changes in dependants, children's details, DOB and any Centrelink benefits applicable (income of spouse should also be provided).
- Details of any income received in a lump sum which was accrued in earlier income years (e.g. assessable pensions).
- Details of any remote work where your usual place of residence was in a remote area for 183 days or more.
- HECS-HELP Debt details.