



## Individual Return Checklist For the Year Ended 30 June 2013

	<u>Income</u>	Tick or n/a
1.	Please provide all PAYG Summaries from employer(s), Centrelink, Pensions or Superannuation Funds.	
2.	Please provide details of Interest Received from Bank Accounts.	
3.	Please provide a copy of Annual Tax Statement for any Managed Fund Investments.	
4.	Please provide details of any dividends received on shares held during the year.	
5.	Please provide details of any assets sold during the year that may be subject to Capital Gains Tax. <i>For shares please provide buy and sell contracts.</i> <i>For property please provide copy of the <b>original purchase contract</b> and settlement statement together with sale contract and settlement statement.</i>	
6.	Please provide details of income and expenses of any rental properties. <i>Where possible please provide agent annual summaries.</i>	
7.	Please provide details of any Tax-free government pensions you or your spouse received from Centrelink or Department of Veterans' Affairs.	
8.	Please provide details of any income earned, derived or received from outside Australia (including gifts from relatives, foreign business investments and exempt foreign employment income) for you and your spouse.	
9.	Please provide details of any other income received which you believe may be assessable for tax purposes.  Please provide description  _____  _____	

Deductions		
1.	Please provide details of any work related Motor Vehicle expenses in relation to vehicles owned in your personal names. <i>If log book completed provide business % and expenses incurred. If no log book please provide business kilometres travelled during the year and the model/make and engine capacity of the vehicle.</i>	
2.	Please supply details of any work related travel incurred by you personally. <i>i.e. Train, Bus, Taxi and Air fares. Accommodation and meals etc.</i>	
3.	Please provide details of any Uniform, Laundry or Protective Clothing expenses connected with your work.	
4.	Please provide details of any Self Education Expenses incurred which have a connection to your current employment <i>i.e. University Fees, Text Books etc</i>	
5.	Please give details of any other work related expenses <i>i.e. Union Fees, Home Office (Electricity &amp; Phone), Seminars, Subscriptions etc.</i>	
6.	Please provide details of any Donations made during the year.	
7.	Please provide details of Tax agent's fees & other accounting & tax audit fees associated with managing your tax affairs including all travel costs incurred in attending our office ( <i>mileage, air fares etc</i> )	
8.	Please provide details of any Sickness & Accident or Income Protection Insurance Policy Premiums paid.	
9.	Please provide details of any personal superannuation contributions made on your or your spouse's behalf.	
10.	Please provide details of any eligible personal super contributions made (for which you are not claiming a deduction) and wish to claim the Super co-contribution from the ATO.	
11.	Please provide details of any child support paid or benefits provided for the maintenance of your child paid by your or your spouse.	

Tax Offsets		
1.	Please give details of Partner/Dependents: <div style="display: flex; justify-content: space-between; margin-left: 40px;"> <span><u>Full Name</u></span> <span><u>Date Of Birth</u></span> </div> <i>Spouse:</i> _____ <i>Dependents:</i> _____ _____ _____	
2.	Did you receive Family payments fortnightly from Family Assistance Office?	
3.	Did you have private health insurance? If yes, please provide annual Health Fund Rebate Statement.	

4.	<p>Did you incur <u>net</u> medical expenses for you and your dependents <b>greater than \$2,120</b> for the year? i.e. were you out of pocket more than \$2,120 on doctor, dentist, optometrist, hospital, prescriptions, physiotherapy, chiropractic and other similar medical costs? If yes please provide details <b>including a copy of your Medicare Card</b> as we require this to confirm out of pocket expenses through Medicare. Also if you have a private Health Fund please request an Annual Benefit Statement which shows your out of pocket expenses through the fund.</p>	
<b>Bank Account Details</b>		
	<p>Please provide details of the bank account you would like any Tax Refund to be directly deposited to. Please note that this account must be in your name and can be a jointly held account.  Account Name (e.g. John Smith): _____   BSB (must be six digits):   __ __ __ - __ __ __   Account Number: _____</p>	

<p>Other Information – please provide any other details you believe relevant to this years return:</p>

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