

Individual Client Checklist 2011

Income

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| Salary & Wages - PAYG Payment Summary | |
| Reportable Fringe Benefits | |
| Allowances Commissions etc | |
| Eligible Termination Payments | |
| Government Allowances | |
| Government Pension details - Centrelink, Veterans Affairs | |
| Other Pensions and Annuities including Superannuation Pensions | |
| Interest Received | |
| Dividends Received | |
| Employee Share Schemes | |
| Distributions from Partnerships & Trusts | |
| Annual Tax Statements from Managed Funds | |
| Capital Gains or Losses (from the sale of assets such as shares or property) | |
| Foreign Employment Income | |
| Foreign Pension | |
| Foreign Investment Income | |
| Rental Income | |
| Bonuses from Life Insurance Companies or Friendly Societies | |
| Any Other Income | |

Deductions

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| Motor Vehicle Expenses | |
| Log Book Method - Provide details of expenses and logbook % | |
| One Third Method (For travel over 5,000 kms, but no logbook) Provide details of expenses | |
| 12% Method (For travel over 5,000 kms, but no logbook) Provide details of vehicle purchase price | |
| Cents per km Method (For travel up to 5,000 kms) Provide explanation of travel and kms for the year | |
| Other Travel Expenses | |
| Self Education Expenses | |
| Work Uniform or Protective Clothing (Including sun protection for outdoor workers) | |
| Other Work Related Expenses | |
| Union dues | |
| Professional associations | |
| Telephone & Internet | |
| Home Office Expenses | |
| Diary and stationery | |
| Work Tools, Plant & Equipment, Office Furniture & Equipment | |
| Expenses relating to Dividend and Interest Income | |
| Gifts or Donations | |
| Undeducted Purchase Price for Superannuation Pensions or Annuities | |
| Cost of Managing Tax Affairs | |
| Losses from previous years | |
| Non-Employer Sponsored Superannuation | |
| Income Protection Insurance Premiums | |

Offsets

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| Dependent Spouse | |
| Senior Australians | |
| Pensioners | |
| Superannuation or Annuity | |
| Private Health Insurance - Fund Name & Type of Cover | |
| Education Tax Refund | |
| Superannuation Contributions on Behalf of Low Income Spouse | |
| Remote Area Zone Allowance | |
| Overseas Military Service | |
| Net Medical Expenses over \$2,000 | |
| Parent or Invalid Relative | |
| Mature Age Worker (over 55) | |
| Entrepreneurs Tax Offset | |

Other Details

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| HECS-HELP Debt & Other Student Loans | |
| PAYG Instalments Paid | |
| Adjustments to Tax Free Threshold for Change of Residency | |