



CLIFTON ACCOUNTANTS 2008 TAX RETURN CHECKLIST (summarised single page for easier use)



Name:
 Address:
 Phone No: Day Mobile
 Email Address:

INCOME

	Y	N	
Salary / Wages / Centrelink (PAYG Forms)	<input type="checkbox"/>	<input type="checkbox"/>	Please include copies of your Group Certificates / PAYG Payment Summaries
Eligible Termination Payment	<input type="checkbox"/>	<input type="checkbox"/>	Attach ETP Statements for funds withdrawn from Super or Termination payments
Interest Received	<input type="checkbox"/>	<input type="checkbox"/>	Include either bank statements or a summary of interest received.
Dividends / Distributions	<input type="checkbox"/>	<input type="checkbox"/>	Include statements of dividends received by you between 01/07/07 to 30/06/08
Partnership / Trust	<input type="checkbox"/>	<input type="checkbox"/>	Include yearly Tax Summaries from trusts such as BT, Colonial, AXA, etc.
Capital Gains (e.g. property or shares sold)	<input type="checkbox"/>	<input type="checkbox"/>	Please include details of sale and purchase, along with copies of settlement sheets
Rental Income	<input type="checkbox"/>	<input type="checkbox"/>	Please provide details of rent income and expenses including interest on loans.
Other Income	<input type="checkbox"/>	<input type="checkbox"/>	Please include details of any other income received during the year.

DEDUCTIONS

Work related Car Expenses	<input type="checkbox"/>	<input type="checkbox"/>	Provide total work km's travelled or log book, car expenses paid & engine size
Uniforms, Protective Clothing, Cleaning & Maintenance, etc	<input type="checkbox"/>	<input type="checkbox"/>	Include dry cleaning & purchases of uniforms with logo's or protective clothing (i.e boots, overalls, etc)
Other Work Expenses			
Diary / Stationery / Work Materials / Tools	<input type="checkbox"/>	<input type="checkbox"/>	Please provide details of all purchases including date of purchase if a single item costs more than \$300
Union or Professional fees	<input type="checkbox"/>	<input type="checkbox"/>	Please provide details if this item is not shown on your PAYG Payment Summary
Sickness & Accident Insurance / Income Protection	<input type="checkbox"/>	<input type="checkbox"/>	Please provide details
Seminar costs or Self Education	<input type="checkbox"/>	<input type="checkbox"/>	Please provide km's travelled, accommodation, meals, course fees, text books, printing, stationery and any other cost or expense relevant
Expenses for Interest or Dividend Income			
Bank Fees and Interest costs	<input type="checkbox"/>	<input type="checkbox"/>	Bank statements would provide this information
Investment advice annual review fee (but not Capital cost on Investing)	<input type="checkbox"/>	<input type="checkbox"/>	Please provide details or receipts of any financial advice received
Gifts or Donations > \$2	<input type="checkbox"/>	<input type="checkbox"/>	Details or receipts to a registered charity. List charity name and amount donated
Undeducted Purch Price of an Australian Pension or Annuity	<input type="checkbox"/>	<input type="checkbox"/>	Please provide all documents connected with payouts from Super, ETP's, Annuities
Tax Agent fees paid	<input type="checkbox"/>	<input type="checkbox"/>	Please provide details of fees for accountancy work done, particularly if work was not done by Clifton's
Travel to Agent:kmcc	<input type="checkbox"/>	<input type="checkbox"/>	How many trips * return km's (t * km = total km's)travelling to your Accountant in the last financial year? What is your vehicle engine size cc?

TAX OFFSETS

Private Health Cover	<input type="checkbox"/>	<input type="checkbox"/>	Do you have private health cover? Please provide a copy of the health fund statement they send after the end of the financial year
Spouse			
- Did you have a spouse for the full financial year?	<input type="checkbox"/>	<input type="checkbox"/>	
- Did your dependant spouse earn less than \$6,000?	<input type="checkbox"/>	<input type="checkbox"/>	Please provide spouse's taxable income
Does your spouse receive any benefits from Centrelink?	<input type="checkbox"/>	<input type="checkbox"/>	Please provide details of benefits
Superannuation			
Have you made any personal contributions to a superannuation fund?	<input type="checkbox"/>	<input type="checkbox"/>	Please provide details (only claimable if your income from wages is less than 10% of your total income before deductions)
Medical Expenses			
You may be entitled to a rebate if your out of pocket expenses on medical exceeds \$1,500	<input type="checkbox"/>	<input type="checkbox"/>	Please provide a summarised total of your expenses (out of pocket amounts only)
30% Child Care Tax Rebate			
Have you paid for Child Care for any of your dependant children?	<input type="checkbox"/>	<input type="checkbox"/>	The ATO will calculate the rebate that you are entitled to. No details required
Other			
Please provide any other details which you are unsure of and would like us to be aware of	<input type="checkbox"/>	<input type="checkbox"/>	

Signature

Date

Please phone our office Bomaderry 4421 5866 or Bowral 4861 2811 to make an appointment or just drop off this information, and we guarantee our professional team at Cliftons will contact you within 4 days of receiving this checklist information and records; either to send you the completed Income Tax Return or advise you of the position, information required, etc