



Individual Tax Return Information Checklist 2009

Client name: _____ Email: _____

Information required;	Supplied	N/A
1) PAYG Payment Summaries (Group Certificates)	<input type="checkbox"/>	<input type="checkbox"/>
2) Lump Sum and Termination payments	<input type="checkbox"/>	<input type="checkbox"/>
3) Government pensions and allowances	<input type="checkbox"/>	<input type="checkbox"/>
4) Other pensions &/or annuities	<input type="checkbox"/>	<input type="checkbox"/>
5) Tax statements of managed investment funds	<input type="checkbox"/>	<input type="checkbox"/>
6) Interest income from banks and building societies	<input type="checkbox"/>	<input type="checkbox"/>
7) Dividend statements for dividends received	<input type="checkbox"/>	<input type="checkbox"/>
8) Contracts and details of shares sold or purchased	<input type="checkbox"/>	<input type="checkbox"/>
9) Contracts and details of investment real estate sold or purchased	<input type="checkbox"/>	<input type="checkbox"/>
10) Rental property statements from real estate agent and details of other expenditure incurred. Refer to Spectrum website for a more detailed checklist for this item; http://www.spectrumfp.com.au/accounting-resources *	<input type="checkbox"/>	<input type="checkbox"/>
11) Work related expenses including (broadly);	<input type="checkbox"/>	<input type="checkbox"/>
+ Car expenses	<input type="checkbox"/>	<input type="checkbox"/>
+ Travel expenses	<input type="checkbox"/>	<input type="checkbox"/>
+ Clothing & laundry expenses	<input type="checkbox"/>	<input type="checkbox"/>
+ Self education expenses	<input type="checkbox"/>	<input type="checkbox"/>
+ Other work-related expenses	<input type="checkbox"/>	<input type="checkbox"/>
Refer to Spectrum website for a more detailed checklist for this item; http://www.spectrumfp.com.au/accounting-resources *		
12) Motor vehicle logbook (where required)	<input type="checkbox"/>	<input type="checkbox"/>
13) Donations to charities	<input type="checkbox"/>	<input type="checkbox"/>
14) Private health insurance tax statement	<input type="checkbox"/>	<input type="checkbox"/>
15) Net medical expenses (if over \$1,500 after rebates for you and your dependants)	<input type="checkbox"/>	<input type="checkbox"/>
16) Expenses eligible for the Education Tax Refund (new). Refer to Spectrum website for more detailed information regarding claim eligibility for this offset ; http://www.spectrumfp.com.au/accounting-resources *	<input type="checkbox"/>	<input type="checkbox"/>
17) Income protection premiums paid (unless organised by Spectrum Investment Services)	<input type="checkbox"/>	<input type="checkbox"/>
18) Anything else you feel may be relevant	<input type="checkbox"/>	<input type="checkbox"/>

Please feel free to attach this checklist with your information when you bring it in to us!

* If you are having trouble obtaining any additional information or checklists from our websites, please call our office and we will be happy to arrange for paper copies to be sent to you.