



TAX CHECKLIST - 2015 INDIVIDUAL INCOME TAX RETURNS

Documents to help prepare your tax return

- Please provide documents for any items below that apply to you. If you don't have all the documents, continue to attend your appointment and you can post, bring in, email or phone in the missing information.
- If you have income, deductions or special circumstances not listed below that you feel may affect your tax return, contact your Success Tax Professionals accountant for advice about other documents that you may need to supply.
- **Your Tax Refund:** The tax office process most refunds within 14 -21 days for electronically lodged tax returns. If after **28 days** your refund has not been received you can call **13 28 65**. You will need your tax file number. Where Family Tax Benefit is involved refunds almost always take longer so allow extra time.
- **Audits and Data Matching:** The tax office may ask you to prove claims made on your tax return by asking to see documents and receipts. The tax office also checks income with organizations like banks and Centrelink (Human Services). Undeclared income and false claims can incur serious penalties. The tax office can also select and intensively audit specific occupations or items in tax returns. Always declare all of your income and make sure you have evidence of deductions you are claiming.

IMPORTANT	BANK DETAILS
The tax office requires all tax refunds to be paid into an Australian bank account. Please ensure you have your account details.	Account Details: BSB, Account No., Name on Account
NEW CUSTOMERS	DOCUMENTS
New clients to Success Tax Professionals	<ul style="list-style-type: none"> • Photo Identification – e.g. passport or drivers licence • A copy of last year's taxation return if available.
INCOME	DOCUMENTS
Salary and wages	PAYG Payment Summary Statement from employer
Employment Termination Payments	ETP Payment Summary
Newstart, Sickness or other Government Benefits	Centrelink Payment Summary Statement
Australian Government Pensions	Centrelink Payment Summary Statement
Australian annuities and superannuation income streams	Payment Summary or a statement from the Australian annuity, superannuation or RSA provider
Interest	Bank statement, passbook, or other documentation from financial institutions or other sources confirming interest paid
Dividends	Dividend statements
Capital gains or losses	Documents showing the date assets were acquired, their cost price, and other expenditures that form part of the cost price. Also documents showing the sale date, costs of disposal and sale proceeds.
Foreign source income	Documents evidencing foreign source income
Rent received	Details of all rent earned, interest on borrowings that finance the rental property, details of other expenses relating to the rental property and details of capital works expenditures.
Net income or loss from business	Details on business income and expenses
Other income	Documents confirming income received
Employee Share Scheme	Documentation provided by the employer
TAX OFFSETS	DOCUMENTS
Private Health Insurance Funds	Health Fund Statement (essential document)
Net medical expenses (for 2015 this offset only applies if also claimed in both 2013 and 2014 tax return)	Health Fund statements, Receipts, Medicare statements
DEDUCTIONS	DOCUMENTS
Work related car expense claims	Receipts, log book, evidence of business kilometres travelled
Other work related travel expenses	Receipts, diary
Work related uniform and other clothing expenses, e.g. protective clothing, occupation specific clothing, non-compulsory uniform, conventional clothing, laundry, dry cleaning	Receipts
Other Work Related Expenses: <ul style="list-style-type: none"> ● Seminars/courses not at an education institution but related to work (including travel, course fees, other) ● Home office expenses ● Computer and software ● Telephone and mobile ● Tools and equipment ● Subscriptions, union fees, professional body fees ● Journals/periodicals ● Depreciation ● Expenses in relation to allowances ● Sun protection ● Other 	Receipts (Where there is a private use component – for example home office telephone where a percentage of use is for business and a percentage of use is private, the deduction will only be allowable for the business component).
Assets purchased for work purposes (either totally or partially), e.g. computer, briefcase	Receipts
Interest and dividend deductions	Financial statements or receipts
Gifts and donations	Receipts
Cost of managing tax affairs	Receipts (e.g. tax agent fees, travel to accountant)
Other deductions e.g. Income Protection Insurance	Receipts or supporting documents