



Individual Year End Information

Year Ended 30 June _____

Name _____

Address _____

Mobile _____

Email _____

Income

| | Y | N | |
|----------------------------------|--------------------------|--------------------------|--|
| Salary / Wages / Centrelink | <input type="checkbox"/> | <input type="checkbox"/> | copies of PAYG summaries |
| Eligible Termination Payment | <input type="checkbox"/> | <input type="checkbox"/> | statements |
| Interest | <input type="checkbox"/> | <input type="checkbox"/> | bank statements or summary |
| Dividends / Distributions | <input type="checkbox"/> | <input type="checkbox"/> | statements of amounts paid 01/07-30/06 |
| Employee Share Scheme | <input type="checkbox"/> | <input type="checkbox"/> | statements with date acquired and value |
| Partnership / Trust | <input type="checkbox"/> | <input type="checkbox"/> | annual tax summary report |
| Capital Gains (shares, property) | <input type="checkbox"/> | <input type="checkbox"/> | sale and purchase details, contracts |
| Foreign Employment Income | <input type="checkbox"/> | <input type="checkbox"/> | payment summaries, receipts, statements |
| Rental Income | <input type="checkbox"/> | <input type="checkbox"/> | provide details of all income and expenses |
| Other Income | <input type="checkbox"/> | <input type="checkbox"/> | provide details |

Deductions

| | Y | N | |
|--|--------------------------|--------------------------|-------------------------------------|
| Car Expenses | <input type="checkbox"/> | <input type="checkbox"/> | total km or logbook & expenses paid |
| Travel Expenses | <input type="checkbox"/> | <input type="checkbox"/> | accom, tolls, parking, fares, meals |
| Uniforms / Protective Clothing | <input type="checkbox"/> | <input type="checkbox"/> | purchases, dry cleaning, repairs |
| Self Education | <input type="checkbox"/> | <input type="checkbox"/> | expenses, connection to job, travel |
| Other Work Expenses | | | |
| - Diary, Stationery, Tools | <input type="checkbox"/> | <input type="checkbox"/> | annual tax summary report |
| - Union / Professional Fees | <input type="checkbox"/> | <input type="checkbox"/> | details if not on PAYG summary |
| - Sickness / Accident / Income Insurance | <input type="checkbox"/> | <input type="checkbox"/> | details of policy |



Fact Sheets

- Seminars
Interest / Dividend Expenses
Gifts / Donations > \$2
Tax Agent Fees

| | |
|--|--|
| | |
| | |
| | |
| | |

details of expenses
bank fees, investment review
details if to registered charity
if not Cliftons, travel km

Tax Offsets

Private Health hospital cover
Spouse
- For full year
- Did they earn income
- Did they receive Government benefits
Superannuation Contributions

| Y | N |
|---|---|
| | |
| | |
| | |
| | |
| | |
| | |

copy of fund year end statement
if N date from and to
if Y provide taxable income
if Y provide details
provide details including amount and fund

Other

Tax Free Government Pensions
Child Support paid
Any other items we should be aware of
1.
2.
3.

| Y | N |
|---|---|
| | |
| | |
| | |
| | |
| | |

provide details, for adjusted taxable income
for increasing eligibility to benefits

Notes

Signature _____

Date _____