

# 2014 TAX RETURN CHECKLIST INDIVIDUAL



CLIENT NAME: \_\_\_\_\_

AAR Consulting's Tax Checklist, to assist you in collating the necessary information to complete your 2014 Income Tax Return.

It would be appreciated if you could complete the checklist below by marking the relevant boxes, and return with your information to our office.

	Documents Required	Provided	Waiting on Information	N/A
1	Copy of your most current Tax Return; ( <i>If we have prepared your 2013 Tax Return, we will have a copy on file</i> )			
2	Details of your Bank Account; Australian Financial Institution Details are now required when lodging Individual Income Tax Returns. <i>(Please provide Bank Account details below)</i> <b>Bank Details</b> <b>BSB:</b> <b>Account Number:</b> Institution Name:			
3	Originals of -			
	a ) PAYG Payment Summary from your employer;			
	b ) PAYG Payment Summary and letter from Centrelink and DEET;			
	c ) PAYG Payment Summary from benefits funds; Superannuation Funds, Veterans affairs, Pensions or annuities;			
	d ) PAYG Payment Summary for subcontractors;			
	e ) Austudy Payment Summary;			
	f ) Did you receive an allowance in the 2014 financial year? ( <i>If yes, please provide a copy of your payslip</i> )			
4	Job Description for Income received during the 2014 financial year;			
5	Details of Interest received on bank accounts; ( <i>Both in your name and joint names</i> )			
6	Any Termination payments received;			
7	Details of tips or directors fees received;			
8	Details of income from partnerships or trusts; ( A copy of the 2014 Partnership or Trust Tax Return will be required if not prepared by AAR Consulting )			
9	Details of Managed Funds - Tax Statements; ( The 2014 Tax Statements will be required )			

10	Details of any properties purchased or disposed of during the 2014 financial year; ( Required information includes buy and sell contracts, final settlement statements on purchase and sale, and any associated costs )			
11	Details of any shares purchased or disposed of during the 2014 financial year; ( Required information includes buy and sell contracts, shareholding statements and associated costs. This also includes shares in relation to Employee Share Schemes )			
12	Details of any foreign income received;			
13	Details of any rental income and expenditure; ( Required information includes rental statements and receipts )			
14	Details of any dividends received from companies; ( Dividend Statements will be required )			
15	Receipts for all deductions you may wish to claim as expenses in relation to your Employment;			
16	Receipts for all relevant expenses incurred in deriving other income;			
17	Log books, travel diaries or records of km's travelled for Motor Vehicle and travel expenses. If claiming motor vehicle as a deduction, we will require details of the motor vehicle;			
18	Receipts for donations;			
19	Receipts for all self education expenses and details of courses undertaken;			
20	Details of spouse's income;			
21	Details of any personal superannuation contributions,or contributions on behalf of your spouse (if made);			
22	For self-employed or partly self-employed persons, if you intend to claim personal super contributions as a tax deduction, you must provide a Personal Tax Deduction Notice from your Superfund;			
23	<u>For self-employed persons:</u> Bank statements and loan statement,invoice books, cash receipt books and bank deposit books detailing your income, cheque books, order books and receipts detailing your expenses. Copies of Business Activity Statements and workings for the relevant financial year, if not prepared by AAR Consulting;			
24	2014 Tax Statement from Private Health Insurance Company;			
25	Did you make a claim for net medical expenses in the 2013 Financial Year? If so, please provide all Medical Receipts, including your annual statements by Medicare and Private Health Insurance summarising total medical benefits paid and out of pocket expenses paid this financial year;			
26	Letters from your Superannuation Fund, if receiving a pension from the fund;			
27	Have you lived or worked in a remote or isolated area of Australia (not including an offshore oil or gas rig)? Have you served overseas as a member of the Australian Defence Force or a United Nations armed force? If applicable, please provide the number of days and location;			
28	Number of dependent children? A dependant child is your child who is under 21 years old, or, 21 to 24 years old and a full-time student regardless of their income.			
29	If available, please provide your medicare number and details: <b>Medicare Number:</b> <b>Name:</b>			

<b>30</b>	Any other relevant Information, including:			
	a) Details of additional children born during the year, including Name and Date of Birth;			
	b) Any change of personal information such as address, email address or phone/fax numbers;			
	c) Any change of circumstances;			
<b>31</b>	<b>Additional Information</b>			
<b>32</b>	<b>Notes to Accountant</b>			