CHECKLIST FOR SALARY & WAGE CLIENTS
INFORMATION FOR INCOME TAX RETURNS PREPARATION
FOR THE PERIOD 1ST JULY 2012 to 30TH JUNE 2013

- [ ] Payment Summary/s from employer(s), and / or Statement of Earnings from DHS (Centrelink).
- [ ] Details of interest received - including accounts closed and investments matured during the year. See your bank if necessary.
- [ ] Details of dividends received - including advices received with the dividend cheque and / or reinvestment advices (for Imputation Credits). Note that there are generally at least two dividends each financial year.
- [ ] Details of any other taxable income received by you during the year.
- [ ] Details of Termination Payments and / or Superannuation withdrawals including Statement of Termination Payment.
- [ ] Details of expenses necessarily incurred by you in earning the above income, for which you are able to substantiate by receipts. (e.g. motor vehicle, protective clothing, union fees, self-education, and donations).
- [ ] Details of acquisition / disposal of property and other assets (i.e. shares) for possible Capital Gain / (Loss) purposes.
- [ ] Details of Private Health Fund cover (Fund will send you a letter with relevant details).
- [ ] Name and Date of Birth of all your Dependent Children.
- [ ] Bank Account Details for your refund to be deposited (we require BSB, Account Number and Account Name) this is very important and we can no longer lodge returns without these details. The account has to be in your name.
- [ ] If your net medical expenses were more than $2,120, after rebates from Medicare and your private health insurer, you will be entitled to a rebate. Please supply relevant details. Note that medical costs include doctors, prescriptions, dentists, optometrists, etc.

Please make any notes or reminders for your appointment and bring this checklist with you to your appointment:

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May Partners
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