

**PDH ACCOUNTING SERVICES PTY LIMITED**



**2017 YEAR END INCOME TAX CHECKLIST - Individual**

This is a general checklist. If an item does not apply to you, please tick N/A.  
If you're not sure about anything please give us a call.

Attached	N/A	
<input type="checkbox"/>	<input type="checkbox"/>	2017 PAYG Payment Summaries (including from Centrelink)
<input type="checkbox"/>	<input type="checkbox"/>	Redundancy/ETP/ Lump sum payment details
<input type="checkbox"/>	<input type="checkbox"/>	Details of all interest received for the year
<input type="checkbox"/>	<input type="checkbox"/>	Listing of all dividends received for the year
<input type="checkbox"/>	<input type="checkbox"/>	Trust and partnership distribution tax statements
<input type="checkbox"/>	<input type="checkbox"/>	Rental property details, including: - period rented - agent statements showing income and expenses - invoices for any other expenses paid personally (eg insurance) - loan statements showing interest paid - details of assets purchased and/or sold - any other relevant information
<input type="checkbox"/>	<input type="checkbox"/>	Details of purchase or sale of property, shares and/or other assets, including jewellery, boats, caravans, artwork, collectables.
<input type="checkbox"/>	<input type="checkbox"/>	Details of any shares received under employee share plans
<input type="checkbox"/>	<input type="checkbox"/>	Work related travel expense details, including bridge/road tolls, car parking, etc
<input type="checkbox"/>	<input type="checkbox"/>	Work related motor vehicle expense details (Log Book and running expenses if >5000 km travelled or details of kilometres travelled if <5000 km)
<input type="checkbox"/>	<input type="checkbox"/>	Uniform and/or protective clothing purchases and maintenance, sun protection, etc
<input type="checkbox"/>	<input type="checkbox"/>	Details of any self education expenses paid (must be directly related to your employment)
<input type="checkbox"/>	<input type="checkbox"/>	Other work related expenses, i.e. conferences, seminars, telephone, tools of trade, income protection insurance
<input type="checkbox"/>	<input type="checkbox"/>	Home office running expenses including telephone, electricity, internet and computer expenses
<input type="checkbox"/>	<input type="checkbox"/>	Details of interest paid for income producing assets, including a copy of all loan statements
<input type="checkbox"/>	<input type="checkbox"/>	Listing of donations/gifts made during the year

- Details of costs to prepare last year's tax return
- Private Health Fund Insurance Statement (details of fund name, Policy number, type of cover).**
- Net amount of medical expenses paid for your family (**only available for disability aids, attendant care or aged care**)
- Details of your personal superannuation contributions if you intend to claim the government co-contribution.
- Details of any HELP Debt
- Health care card details if any
- Copy of Instalment Activity Statements

If there are any other items you feel are tax deductible please ring us to discuss.

**Note: If you are mailing your documents to us, please provide the following additional information:**

Preferred contact method:

Mail  Email  Telephone

Preferred contact details:

Mail/Email Address or Telephone Number:

---



---

.....

**The Australian Taxation Office requires that all refunds to be deposited into a financial institution/bank account.**

Please provide your preferred financial institution/bank account details:

BSB Number: \_\_\_\_\_

Account Number: \_\_\_\_\_

Account Name: \_\_\_\_\_