



PERSONAL TAX RETURN INFORMATION CHECKLIST

	YES	NO	N/A
1. Payment Summaries (Group certificates)			
1. Any Centrelink payments received (Y/N)			
2. Other income e.g.: Interest, dividends, trust distributions (e.g. managed funds), termination payments sale of shares or other assets, superannuation pensions			
3. Sale of assets – purchase documents (purchase contract, settlement statement, stamp duty), sale documents (sale contract and settlement statement)			
4. Motor vehicle, other travel expenses, out of pocket expenses not reimbursed by business, km travelled and log book – if any			
5. Work related study expenses			
6. Compulsory uniform, laundry expenses, protective clothing, etc			
7. Other work related expenses – professional associations, union, journals, tools of trade, etc.			
8. Donations			
9. Expenses related to investment income			
10. Other expenses e.g. income protection insurance, personal superannuation contributions (deduction allowed only in certain circumstances), investments in forestry managed investment schemes			
11. Children's Education Expenses + details of children in primary/secondary school, if Family Tax Benefit Part A is received.			
12. Did you work in a remote location during the income year? If yes, please provide the location worked and time away from usual place of residence			
13. Medical expenses (out of pocket) totalling more than \$1,500 e.g.: Medicare gap, dental, prescriptions. (E.g. All expenses for the year might total \$1525, can claim \$25)			
14. Other information e.g. Private health fund statement (MBF/Medibank Private, usually posted out in July), HECS/HELP statements			
15. Have you made a non-tax deductible contribution to super in order to claim the government co-contribution to your superannuation fund			
16. If you have a spouse who lodges a tax return, but is not a client of LG Accounting Solutions, please provide a copy of their tax return as detailed information from it is now required to be entered on the return			
17. Please advise if any of your personal circumstances have changed e.g. change of address, change in dependents, marital status, change in occupation.			