

CHECKLIST FOR INDIVIDUALS

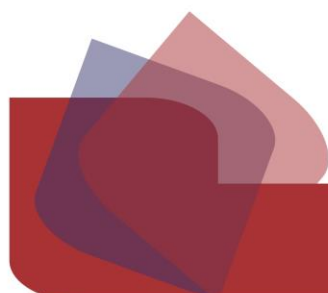
This checklist should be used as a general guide to assist you in gathering the information for your accountant to complete your annual end-of-year taxation and accounting work. If you have information that is not mentioned in this checklist, please do not hesitate to bring it along.

If you are new to our accountancy practice, please bring the following information along:

- ☐ Prior year Income Tax Return/s
- ☐ Name and address of prior accountancy practice utilised
- ☐ Full name/s of any dependent children, including dates of birth/s (if applicable)

End-of-Year information for individual Income Tax Return/s

- ☐ Copy of PAYG Payment Summary /Summaries from employment or Centrelink
- ☐ Details of interest earned on bank accounts
- ☐ Details of dividends received
- ☐ Managed Fund annual tax statement/s
- ☐ Rental property income and associated expenses, including:
 - Rental property agent annual statement
 - Body corporate fees
 - Council & water rates
 - Insurance
 - Repairs & Maintenance
 - Details of trips made, to inspect the property
 - Annual bank interest charged, if a mortgage is taken out on the property
- ☐ If you have had a capital gain even during the year (for example, selling shares or a property), please contact our office for what information you are required to bring in
- ☐ Details of any deductions, including:
 - Number of kilometres travelled by motor vehicle for work-related purposes
 - Details of travel expenses (including airline, accommodation and incidental costs) for travel incurred throughout the year for work-related purposes
 - Details of expenses incurred for training courses undertaken that was directly connected to your current employment
 - Details of any other expenses that had a nexus to your current employment, including:
 - memberships and subscriptions
 - telephone costs (please advise work-related percentage)
 - printing, postage and stationery
 - computer and internet costs (please advise work-related percentage)
 - technical books and publications.
- ☐ Private Health Insurance annual statement.



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P: 07 4033 0210

F: 07 4033 0910

E: nicole@nicolemeertens-ca.com.au

Suite 16/12-20 Toogood Rd

Woree Plaza

Woree, QLD 4868

Postal address:

PO Box 871

Manunda, QLD 4870



Tax agent
29265000

ABN: 15 877 479 335

www.nicolemeertens-ca.com.au