2011 Information sheet for Individual Income Tax Returns

	Attachments
Have any of your personal details changed in the last Financial Year - if YES, please contact us or visit our website to update.	Yes / No

INCOME

1. ***PAYG Payment Summaries***

   Including pensions (if applicable)

2. ***Other salary income***

   Include any director's fees, commissions etc.

3. ***Termination payments***

   If you received an employment termination payment please provide details

4. ***Interest***

   Money received on your bank accounts

   - Name of bank
   - Account No.
   - Interest received
   - TFN Withholding amount
   - Joint account Yes / No

5. ***Dividends***

   Please provide copies of dividend statements of income received. Also note that if you are on a **dividend reinvestment plan (DRP)** which means you don't physically get the money banked, the fund uses that money to buy you more shares and this is still income that must be included in your return

   - Name of shares
   - Number of shares held
   - Amount received.

6. ***Trusts & Partnerships***

   (i.e. example of trusts are BT funds, Merrill Lynch, AXA etc.) Name of trust or partnership - Please provide annual taxation summaries to show income from the funds you list

7. ***Capital Gains***

   Did you sell any assets such as shares or property which were acquired after 20 September 1985? Yes / No

   If yes, then please provide documentation of when it was purchased / cost and also documents on sale / funds received etc.

   SHARES - Purchase & Sale contracts

   PROPERTY - Please contact your Accounting Manager to discuss details required

8. ***Rental Properties***

   We have provided a list of the Income & Expenditure items we require where applicable. Please supply settlement statements and purchase documents for property acquired after 1st July 2008, as well as a copy of the rental statement provided by the real estate agent if applicable

   Gross Rental Income
   Advertising for tenants
   Agent's Commission
   Body corporate fees
   Borrowing expenses
   Cleaning

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Council & Water Rates
Gardening / Lawn mowing
Insurance
Interest on loans and bank charges
Land Tax
Legal Fees
Repairs & Maintenance
Stationery, telephone & postage
Travel Expenses
Sundry expenses

9. ***Business Income***

If applicable , please provide details of BUSINESS INCOME & EXPENDITURE invoiced under ABN or Contractor arrangement.

10. ***Any other income***

Please provide details of any income you received in the financial year which doesn't fit into any of the above categories.

DEDUCTIONS

Please refer to your 2010 INCOME TAX RETURN for examples. Ensure you are able to substantiate all claims, even if the total is less than $300.

1. ***Motor Vehicle***

Did you use your own car for business / work purposes through the year? Yes / No

If yes, then please provide one of the following:-

Log Book Method - Business % use (please ensure you keep a log book for a continuous period of 12 weeks)

Please provide details of all expenses you incurred over the financial year including:

Fuel
Repairs & Maintenance
Registration
Insurance
Toll Fees
Copy of Finance Contract (if applicable)
Interest on Loan
Cost & purchase date of vehicle.

Kilometres Method - An option to the log book method. Please advise how many kilometres you have travelled for work. The maximum you can claim is 5,000 kilometres.

Kilometres: ____________________

Vehicle Engine Size (in litres i.e. 1.6L): ____________________

2. ***Work Uniform***

Do you have to wear a logo uniform, protective clothing or protective footwear? Yes / No

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3.

If yes, were you out of pocket throughout the year for purchasing any new items including laundry and / or dry cleaning expenditure? If so please provide details.

3. ***Other work related deductions***

Diary / stationery / work materials

Union fees / professional bodies

Income protection

Donations / school building fund

Seminar costs or self education

Are there any other costs you incurred that were directly related to your employment? If so, please provide details below.

REBATES

1. ***Private health insurance***

Do you have private health insurance? Yes / No

If yes, please provide us with copy of the health fund statement they send you after the end of the financial year. This will tell us if you are entitled to a rebate.

2. ***Spouse***

Did you have a spouse for the full financial year? Yes / No

Spouse taxable income for 2011 $ (if applicable)

Does your spouse receive any benefits from Centrelink? Yes / No

Please provide details or attachments

3. ***Medical Expenses***

You may be entitled to a rebate if your out of pocket expenses on medical exceeds $2,000. This means if you are in a private health fund, the portion of which you don't get money back (Medical Expenses cannot include any cosmetics).

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If the total medical expenses exceed $2,000 you are entitled to a 20% rebate on the amount over the $2,000 threshold.

Please provide a summarised total of your expenses (out of pocket amounts only).

4. ***H.E.L.P.***

Note: If you are attending University or have in the past and are paying off your fees through HELP (Higher Education Loan Program) then please provide us with your HELP statement to include in your return.

5. ***Education Tax Refund (ETR)***

In 2011 were you entitled to, or in receipt of Family Tax Benefit Part A? **AND** Yes / No

Do you have a child/children attending:- No. of children

Primary School

Secondary School

If you answered YES to BOTH questions, please bring all receipts relating to education expenses to your appointment.

OTHER

SUPERANNUATION

Superannuation statement/s in order for us to make certain that your entitlements are being paid and the appropriateness of the fund to take advantage of the market as it turns.

Any other information which you are unsure of which category it relates to and you would like us to be made aware of:

Bank Account Details :

Please provide your banking details to allow direct crediting from the ATO of your refund.

BSB :

Account Number :

Account Name :

Thank you for providing this information as it assists us in completing your Income Tax Return.