



INDIVIDUAL TAX RETURN CHECKLIST 2011



Client Name: _____ Client Code: _____

PLEASE CONFIRM:

1) Name change since last return? Yes / No - If yes, previous name details.....

2) Spouse's full name: _____ D.O.B ____/____/____

Spouse for full year Yes/No If No, dates you had a spouse from ____/____/____ to ____/____/____

TAX RETURN DETAILS:

Occupation: _____

Income

Yes No

PAYG Payment summary: -includes FBT, Report Super, Allowances		
Other Income – PSI , Labour Hire, Income Insurances , Voluntary Agreements, Casual		
Employer Lump Sum Payments		
Employment Termination Payments (ETP)		
Aust Govt payments–Austudy, Newstart, etc		
Aust. Gov't Pensions and allowances		
Aust. Annuities & Super Income Streams		
Aust. Super Lump Sum payments		
Interest – Banks, Credit Unions, etc		
Company Dividends		
Employee Share Schemes for shares		
Partnership and/or Trust Distributions		
Capital Gains (sale - shares and property)		
Foreign Sourced Income – wages pensions interest rental assets		
Rental Property Income & Expenses		
Business Income – do checklist B		
Other Gov't Tax Free payments received		

Other Information & tax offsets

Yes No

Private Health Insurance – Hospital		
No of dependants		
Spouse Tax Offset (no children) (Spouse income under \$9,425) ATI limit \$150,000		
Seniors or Pensioner Tax Offset		
Aust. Super Income Stream Offset		
Education Tax Refund (subject to FTB-A)		
Private Health Insurance Offset		
Super for Gov't's co-contribution – limited to ATI of \$61,920 – Must do sub-schedules		
Super contributions on behalf of spouse		
Zone or overseas forces rebate		
NET Medical expenses over \$2,000		
HELP Debt or Student Financial Supplement		
Entrepreneur's Tax Offset – income limit \$70,000 or \$120,000 inc spouse income		
Child support payments made		
Foreign Income Tax Offset – Tax Paid		
MUST CHECK on front sheet – EFT account details for FFR & client		

Medicare Surcharge – base limits of ATI
Single \$77,000 Joint \$154,000



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-continued-



Work Related Deductions

D1. Work related Car expenses: Yes/No

Vehicle details

- Make
- Type
- Engine size
- No. of Kilometres

D2. Work related Travel expenses: Yes/No

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D3. Maint. uniform/protective clothing: Yes/No

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D4. Work related Education Expenses: Yes/No

Including Austudy and/or Newstart

D5. Other work related deductions: Yes/No

a) Telephone – Mobile and/or home

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b) Tools/Minor Equipment under \$300 Yes/No

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c) Sun protection – sunglasses/sunscreen: Yes/No

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d) Subscriptions -Prof. Assoc's/Union Fees Yes/No

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e) Stationery and consumables Yes/No

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f) Home Office Costs Yes/No

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g) Internet Costs Yes/No

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h) Overtime meal expenses(\$25.80) Yes/No

D6. Low Value Pool deductions Yes/No

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New Equipment Items over \$300 Yes/No

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D7. Interest Deductions Yes/No

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D8. Dividends Deductions Yes/No

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D9. Gifts/Donations: Yes/No

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D10. Managing Taxation Affairs: \$

- Travel to Tax Agent:
- Interest paid to ATO (GIC):

D12. UPP - Foreign Pension Yes/No

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D13. Personal Super Contributions Yes/No

Fund name

ABN or TFN

Acct No

Date last paid

Contribution/s made \$.....

D16. Income Protection Insurance paid Yes/No

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Tax Losses from previous years - Check

ANY OTHER DEDUCTIONS

PAYMENT OF ACCOUNT:

I will be paying my account by: (please tick)

FEE FROM REFUND

VISA/MASTERCARD

EFTPOS

CASH/CHEQUE

I hereby agree to reimburse Thompson Hughes & Co for all expenses they may incur in recovery or attempting to recover payment from me of the amounts which may from time to time be overdue. These costs include but are not limited to legal, court, solicitors, debt collection agency commission and fees.

ADDITIONAL COPIES OF TAX RETURNS

I acknowledge receipt of a full copy of my taxation return and understand and accept that if I request a further copy for myself or a third party, I will be charged **\$55 per tax return** for the provision of this service.

PRIVACY STATEMENT

Thompson Hughes & Co is committed to protecting the privacy and security of personal information contained on this form and any information you may have provided to us only to provide the services you have requested. If you require Thompson Hughes & Co to provide information to another party we will ask you to complete an 'Authority to Release Client Information' form before we release any information. In some cases we may charge you a fee for this service but we will inform you at the time.

Signed: _____

Date: _____