



PBuzs Pty Ltd t/a Pelican Business Services
Beachmere Central Shops,
1/878 Beachmere Road, Beachmere QLD 4510
ABN: 98 619 739 392



Contact Pelican Business Services to arrange your tax return
appointment today!

Call Amanda 0405 107 094

www.pbuzs.com.au

circle the Y/N beside the items that apply to you.

Don't worry if you aren't sure about any of the items – Amanda (your accountant) will answer your questions.

Individual Tax Return Checklist – Basic

Please collect your receipts, tax invoices and documents for the items below – check them off when you've found them – this will make your tax return appointment faster and easier.

GENERAL

- Bank Account Income Y/N
- Email Address Y/N
- Last Year's Income Tax Return Y/N
- Records of sales and purchases of any shares, business or property Y/N
- Private Health Insurance Details Y/N
- Spouse Details Y/N
 - If Yes then: What is your spouse's name?**
 - Can you please provide your spouse's DOB Y/N**
 - Do you know your spouse's taxable income Y/N**
- Children's details including D.O.B and evidence of any Centrelink benefits Y/N

INCOME

- PAYG Summaries Y/N
- Pensions or Government payments/Allowances Y/N
- Interest earned for the relevant year from the banks, building societies etc. Y/N
- Dividend Statements Y/N
- Details of rental property income Y/N
- Details of any business income Y/N
- Details of any other income earned Y/N

EXPENSES

- Work Related Expenses For example: *uniform, tools, education, fees etc.* Y/N
- Motor Vehicle Expenses *Incl. estimation of Kilometres if no logbook kept, otherwise logbook and all expense items* Y/N
- Travel Expenses Y/N
- Investment Expenses For example: *bank fees, financial advisors fees, investment borrowings etc.* Y/N
- Rental Property Expenses For example: *rates, body corp fees, agent fees, interest on loan, repairs and maintenance (inside and out), travel, water rates, depreciation schedule, etc.)* Y/N
- Cost of managing tax affairs Y/N
- Charitable donations evidence (Note only Australian registered charities are deductible) Y/N