

PORT PHILLIP GROUP



YOUR 2009 INDIVIDUAL CLIENT TAX CHECKLIST

Dear Valued Client

Please use this checklist to assist us in gathering information for your Income Tax Return. The checklist outlines the key documents and information that we require.

Income – Please provide evidence

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|--|--------|
| ◆ <u>Salary or wages (PAYG Payment summaries)</u> | Yes/No |
| ◆ <u>Allowances, earnings, tips, directors fees etc</u> | Yes/No |
| ◆ <u>Lump sum payments & Employment termination payments</u> | Yes/No |
| ◆ <u>Centrelink/Government allowance payments</u> | Yes/No |
| ◆ <u>Australian Government Pensions & allowances</u> | Yes/No |
| ◆ <u>Australian Annuities & Superannuation income streams</u> | Yes/No |
| ◆ <u>Australian Superannuation lump sum payments</u> | Yes/No |
| ◆ <u>Interest received</u> | Yes/No |
| ◆ <u>Dividends received</u> | Yes/No |
| ◆ <u>Rental property income</u> | Yes/No |
| ◆ <u>Income from partnerships, trusts and managed investments</u> | Yes/No |
| ◆ <u>Foreign income / foreign pension</u> | Yes/No |
| ◆ <u>Capital gains / losses made on the sale of property, shares, trusts etc</u> | Yes/No |
| ◆ <u>Business Income</u> | Yes/No |

Deductions – Please provide evidence

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|---|--------|
| ◆ <u>Work related car expenses</u> | Yes/No |
| ◆ <u>Other work related travel expenses, parking, train travel, air travel, Tolls etc</u> | Yes/No |
| ◆ <u>Work related clothing/uniform expenses</u> | Yes/No |
| ◆ <u>Work related self education expenses</u> | Yes/No |
| ◆ <u>Other work related expenses (home office, telephone, stationary, subscriptions, union fees, etc)</u> | Yes/No |
| ◆ <u>Rental property expenses</u> | Yes/No |
| ◆ <u>Interest and dividend deductions</u> | Yes/No |
| ◆ <u>Donation to charities</u> | Yes/No |
| ◆ <u>Business expenditure</u> | Yes/No |

Other Information

◆ <u>Private health insurance taxation statement</u>	Yes/No
◆ <u>Out of pocket medical expenses if more than \$1,500</u>	Yes/No
◆ <u>Spouse details and income if applicable</u>	Yes/No
◆ <u>Number of dependent children</u>	Yes/No
◆ <u>Income Protection Insurance</u>	Yes/No
◆ <u>Education tax refund</u>	Yes/No

Please return this checklist together with the required information with your appointment or alternatively post the documents to our office at your earliest convenience.

If we can assist you with any additional information, please do not hesitate to contact us. We will be happy to help. In addition, please write any other relevant information regarding your 2009 tax return in the space provided below.

If you want to make an appointment with one of our Accountants to complete your 2009 Income Tax Return please phone 03 8790 7700 and note the following times:

Clint Chaffey	Monday between 9am – 12pm & 2pm – 5pm
Angela Pollard	Tuesday 9am – 12pm
Robert Gauci	Tuesday 9am – 12pm & 2pm – 5pm
Michael Ball	Wednesday between 9am – 12pm & 2pm – 5pm
Michael Pollard	Thursday between 9am – 12pm & 2pm – 5pm
Angela Pollard	Thursday 2pm – 5pm

* Note: If you are unable to book in with the Accountant of your choice we will try to re-schedule your appointment to another day.

Client notes: