

2010/2011 Tax Return Checklist - BUSINESS

Please turn over

Yes No N/A

Interest & Dividends

Interest on All Bank Accounts Held			
Details of any Dividends Received			
Tax Statements from Managed Funds			
Details of Any Investments/Assets Sold (include both details of the purchase & the sale)			

Rental Property

Details of all Rent Received (Agent Statements or Bank Statements)			
Details of all Expenses Relating to the Rental Property			
All Loan statements Relating to the Rental Property			
Details of the Purchase/Sale of the Property (Settlement Letter & Contract)			

Other

Spouse Income			
Details of Dependent Children			
Details of Child Support Payments (amounts paid or benefits provided for maintenance)			
Health Insurance Yearly Statement			
Medical Receipts (if yearly expenses net of refunds were greater than \$2,000)			
Education Receipts (students undertaking primary or secondary school studies)			
Last Superannuation Statement received			
Home Loan Statement			
Life Insurance Policies			

Additional Notes and Questions You Wish To Raise
