McConachie Stedman

Accountants, Taxation Advisers & Financial Planners

2009/2010 Tax Return Checklist

	Yes	No	N/A
Salary & Wages			
PAYG Summaries (formerly called Group Certificates)			
Foreign PAYG Summaries			
Centrelink Tax Statements			
Australian Government Pensions & Allowances (including Tax Free Pensions)			
Receipts/ Invoices for all Work Expenses			
- Motor Vehicle			
- Travel			
- Uniforms			
- Self Education			
- Sun Protection (if you work in the sun)			
- Other			
Receipts for Donations			
Receipts for Income Protection Insurance			
Details of Superannuation Contributions (including intention to claim form from super fund)			
Investments			
Interest on all Bank Accounts			
Details of all 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 (copy of tax return - if not completed by McConachie Stedman)			
Details of Dependent Children			
Details of Child Support Payments (amounts paid or benefits provided for maintenance during 2009-10)			
Health Insurance Yearly Statement			
Medical Receipts (if yearly expenses net of refunds were greater than $1,500)			
Education Receipts (students undertaking primary or secondary school studies)			