Dear _____

We confirm your appointment with _____ at ____am/pm on _____.

Below is a checklist of items required for the preparation of your taxation returns. Please review this checklist before your appointment and where possible bring the required information with you to the appointment.

McConachie Stedman

Accountants, Taxation Advisers & Financial Planners

2008/2009 Tax Return Checklist

	Yes	No	N/A
Salary & Wages			
PAYG Summaries (formerly called Group Certificates)			
Centrelink Tax Statements			
Invoices for all Work Expenses			
- Motor Vehicle			
- Travel			
- Uniforms			
- Self Education			
- Sun Protection (if you work in the sun)			
- Other			
Receipts for Donations Made			
Spouse Income			
Details of Dependent Children			
Receipts for Income Protection Insurance			
Health Insurance Yearly Statement			
Medical Receipts (if yearly expenses net of refunds were greater than $1,500)			
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)			
Tax Paid			
BAS & IAS Forms if applicable (Sept & Dec, Mar & June)			
PAYG Annual Payment Summaries if applicable			