

## Individual Tax Return Checklist

Please use this checklist to be prepared before coming in to prepare your tax return. This will help us complete your return as quickly as possible.

### 1. Income

- Group certificates & payment summaries
- Lump sum payments, e.g. Eligible Termination
- Centrelink, social security, pensions, allowance documents & statements
- Bank statements (interest received and fees)

### 2. Deductions

- Laundry, clothes, protective items
- Meals, travel
- Car expenses (kilometres, log book, letter from employer, WBS Declaration)
- Tools and equipment
- Home office expenses

### 3. Other Deductions

- Receipts of gifts/donations to charities
- Receipts for self-education expenses, e.g. books/computer costs/car expenses
- Details of income protection premiums

### 4. Tax Offsets

- Sole parent/ spouse/ housekeeper/ low income/aged persons
- Spouse name, date of birth and taxable income
- Private health insurance statement

### 5. Other Useful Information

- Address and Contact Details**
- Your bank account details**
- Children names and dates of birth
- Prior year tax losses

### Did you complete your 2016/2017 Tax Return at WBS?

If **YES**, please provide the above information.

If **NO**, please provide the above information and the following:

- Last year's tax return
- Last year's accounting fee

Phone: 08 9091 4447 Fax: 08 9091 4420  
46 Maritana Street, Kalgoorlie WA 6430