



MILROY

ACCOUNTING PROFESSIONALS

2016 PERSONAL TAX RETURN CHECKLIST

Please indicate the information you are supplying for completion of your Year 2016 Personal Tax Return.

Where you have ticked "Yes", you must provide information to assist in the preparation of your tax return.

INCOME

	Y	N	N/A
PAYG Payment Summaries – Employer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PAYG Payment Summaries – Pension/Unemployment/Other Govt. Benefits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lump Sum/Superannuation Benefits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interest Received – Banks/ Credit Unions/Building Societies/Finance Co/Saving Bonds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dividends Received – statements to be provided	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Managed Funds – tax statements to be provided	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rental Property(s) – Details of income & expenses required	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CAPITAL GAINS

Did you sell any property during the year?
If so, please provide solicitor's settlement statements for the original purchase and the sale of the property.

Y N N/A

Did you sell any shares during the year?
If so, please provide contract settlement statements provided by your broker for the original purchase and the sale of the shares.

Y N N/A

DEDUCTIONS

Car Expenses – details of Km traveled; log books; details of expenses incurred.

Y N N/A

Travel Expenses – travel and accommodation for work

Y N N/A

Work Uniforms – receipts for approved clothing and footwear purchased for work purposes

Y N N/A

Self Education Expenses – details of textbooks; course fees; travel between work and education

Y N N/A

OTHER EXPENSES

	Y	N	N/A
Subscriptions/Memberships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Replacement of Tools and Equipment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sickness and Accident Insurance Premiums	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Income Protection Insurance Premiums	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Donations – supply details of amount of donation and to whom	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other – provide details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

REBATES

Do you have Private Health Insurance? If so, please provide statement from health insurer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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From 1 July 2013 the ATO have made it compulsory to provide your financial institution details in your tax return

Could you please provide us with your financial institution details so the ATO can pay your refund directly into your nominated account.

Account Name: _____

BSB: _____

Account Number: _____

I hereby sign this form accepting that I have provided all information necessary for Milroy Accounting Professionals to prepare my 2016 tax return and instruct them to do so accordingly.

NAME:

SIGNATURE:

DATE: