



2018 Income Tax Return Preparation Sheet

To maximise your deductions and ensure that your tax return is complete, please review the following checklist and advise GBS Partners if any apply to you for the dates 1/7/17 – 30/06/18. If possible, please bring receipts or documentation.

Name: _____

Bank Account Details

Account Name: _____

BSB: _____

Account Number: _____

Income

- Payment Summary/Group Certificate
- Interest Received
- Centrelink/Pension Income
- Eligible Termination Payment (ETP)
- Superannuation income streams
- Dividends Received
- Partnership & Trust Distributions
- Capital Gains (sale of shares or property)
- Rental Property Income (if applicable, see attached)
- Foreign Income
- Business Income (All Income & expenses)

Other Items to Consider

- Private Health Insurance
- HECS Debt
- Disability Aids, attendant Care or Aged Care
- PAYG Instalment Credits
- Superannuation Contributions
- Child Support Payments
- Tax Free Government Pensions
- Dependent Children
- Any Capital Losses bought fwd from prior years

Spouse Details (if return is not lodged by GBS)

- Spouse Taxable Income
- Spouse Child Support paid
- Spouse non-taxable pensions
- Spouse rental losses and investment losses
- Spouse taxable lump sum super (if 55-59 years of age)

Deductions

- Work related Motor Vehicle expenses (Log book where required)
- Work related Travel expenses (Log book where required)
- Work related Clothing & Laundry expenses
- Work related Self-education expenses
- Other work related expenses
- Dividend Deductions
- Interest Deductions
- Charity Gifts & Donations
- Tax related expenses (e.g. travel to tax agent, fees, and ATO interest expenses)

Specific Deductions

- Union Fees
- Home office expenses
- Seminars
- Overtime meals
- Meals & Accommodation - Travel
- Tools & Equipment
- Depreciation
- Computer Expenses
- Memberships & Subscriptions
- Telephone & Internet
- Interest Expenses
- Income Protection Insurance