

Level 2 64 Hindmarsh Sq Adelaide, SA 5000



info@murraybs.com.au murraybs.com.au



t 08 8232 1274 f 08 8232 1273

2018 - 2019 ANNUAL TAX CHECKLIST - Individual

Please use this checklist and include with your accounting records to ensure that all relevant information is provided to enable us to complete your tax work. Where possible please scan and email your documentation to the applicable staff member.

Name(s):	
END OF FINANCIAL YEAR REPORTS Please let us know how you'd like your final reports provided to you: Printed copy Emailed (PDF format) Email Address>	
INDIVIDUAL TAX RETURN INFORMATION Please include copies / originals of the following information for each individual in your family these may apply to you	Attached ly. Not all of
Electronic Funds Transfer (EFT) Please provide bank details for the account you wish to have your refund credited to Account Name: BSB Number: Account Number:	below:
 Income Payment Summaries for any work performed Payment Summaries for any Centrelink payments received Details on allowances, directors fees etc earned Dividend information (copies of dividend slips) Managed funds (copies of Annual Tax Statements) Interest received on personal bank accounts (copies of statements) Details of any FMD's withdrawn throughout the year. Any other income received 	
 Deductions Work related expenses (copies of receipts) Work related car expenses (see motor vehicle section on page 2) Personal superannuation contributions. Donations (copies of receipts) 	

Self education expenses (copies of receipts)

Details of any FMD's deposited throughout the year.

	es r units purchased and sold during the year sets purchased and sold during the year	
 Rental Properties Income details or p Details on loans, sh Expenses relating t Quantity Surveyors Period of rental for Address of Rental I If purchased or sold and contract If you have not pres 	roperty agent statements nowing interest on rental property to rental property s tax depreciation report (if applicable) 2018/19	ils,
	our Annual Health Cover statement as issued by your p h sides of the document for identifying who is covered b	
MOTOR VEHICLE DETAIL	.S	
book if travelling in excess	work related motor vehicle expenses you must have eit of 5,000 business kms per year or a log of total busines kms or a basis on which to determine business kilometr	ss kms travelled for
Log books must be comple	ted at least every 5 years or if there are any changes to	your circumstances
Note: We can supp	oly you with a log book or they can be purchased from a	ny local newsagency
	000 kms please provide <u>all</u> expenses for your vehicle s ance, repairs and maintenance, etc	uch as fuel, tyres and
If claiming less than 5,000	kms please complete the section below:	
Make / Model:		
Registration number:		
Engine capacity:		
Total business kms trav	velled this year:	