



• MORE THAN ACCOUNTANTS •

MTA Tax Return Checklist for Individuals

When you come in to see us at tax-time, please bring the following items to assist us in completing your tax return quickly.

Income earned statements

- Payment summaries
- Payment statements
- Bank statements - showing interest and fees
- Rental Income
- Social security, pensions, allowance statements
- Capital Gains Tax statements (details of any assets sold)
- Deductible amount for pensions/annuities
- Lump sum payments e.g. Eligible Termination
- Trust distribution statements
- Tax statements from Fund managers
- Share dividend statements
- Contract notes for buy/sell transactions
- Tax statements from stockbrokers
- Income stream statements
- Life insurance Bonus Policy statements
- Foreign sourced income
- Partnership distribution

Employment income deductions

- Schedule of work related expenses from ATO i.e. tools, income protection insurance
- Receipts or evidence of work related deductions e.g. car/travel/laundry/meals
- Union fees

Investment related deductions

- Interest / fees on borrowing for investment purposes (bring statements)
- Asset purchase / sale agreements

Offsets

- Dependants – name, DOB, and legal responsibilities
- Child care statements and governments (Child Care Benefits letter)
- Zone – if living in a remote area
- Sole parent/spouse/housekeeper/low income/aged persons
- Spouse contributions to superannuation
- Superannuation pension rebates
- Private health insurance statement
- Medical receipts (if spent more than \$1,500)
- Imputation credit information from dividend
- Statements

Investment property

- Water charges
- Bank fees
- Details of when property was rented, including any rental or Agents statements
- Date when property was purchased
- Capital costs
- Interest on loans
- Advertising fees
- Agent fees
- Body corporate fees
- Borrowing expenses
- Cleaning and general maintenance expenses
- Council rates
- Gardening/lawn mowing fees
- Insurance premiums paid
- Land tax details



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Other deductions

- Tax Agent Fees
- Superannuation if self employed
- Receipts of gifts/donations to charity
- Receipts of self education expenses e.g. books, computer costs, car expenses
- Financing lease statements
- Income Protection premiums (bring statements)

Other useful information

- Credit card statement
- Bank statements (with account name and number, BSB number)
- Cheque butts
- Loan statements
- Previous year's accountant's fees
- Last year's tax return
- Prior year tax losses
- Any tax credit vouchers

Dependants Details

- Baby Bonus – Name, DOB, if you had or gained legal responsibility of a child under five (after 30 June 2001)
- Amount of Family Tax Benefit received fortnightly
- Education Expenses for school aged children
- Material Expenses

New clients

- Last year's Income Tax Assessment
- ABN
- PAYG Instalments paid
- Copy of Return
- Tax File Number

Contact MTA More Than Accountants to book your appointment early, at the time you want! Phone: 1300 139 279

www.mtatax.com.au

TAX RETURNS | BUSINESS SERVICES | FINANCE | INVESTMENT PROPERTY

We're more than just accountants and with four locations across Brisbane, we've got you covered!

UPPER MT GRAVATT (HEAD OFFICE)	GARDEN CITY (SOUTHSIDE)	ASPLEY (NORTHSIDE)	VICTORIA POINT (BAYSIDE)
1917 Logan Road Upper Mt Gravatt QLD 4122 Ph: 07 3349 2066 Fax: 07 3349 1132 Email: mta@mtatax.com.au	Westfield Garden City, Suite 5, Professional Chambers, Kessels Road Upper Mt Gravatt QLD 4122 Ph: 07 3422 2300 Fax: 07 3349 7677 Email: gardencity@mtatax.com.au	Level 1, 1344 Gympie Road Fountain Shopping Centre Aspley QLD 4034 Ph: 07 3863 1311 Fax: 07 3863 1199 Email: northside@mtatax.com.au	Shop E1, Victoria Point Shopping Ctr Cnr Bunker & Cleveland-Redland Bay Rds Victoria Point West QLD 4165 Ph: 07 3820 8927 Fax: 07 3820 9914 Email: victoriapoint@mtatax.com.au