



ULTIMATE TAX & ADVISORY

Office: Unit 2, 868 Beaufort Street Inglewood WA 6052

Postal: PO Box 554 Mt Lawley WA 6929

Email: office@ultimate-tax.com.au

Telephone: 08 6144 3370

Ultimate SK Pty Ltd trading as Ultimate Tax & Advisory

ABN: 55 613 415 437

INDIVIDUAL TAX RETURN CHECKLIST

Below is a checklist of items that may assist you in collating your documents in order for us to process your income tax return

Please tick all relevant items and attach these documents.

Once completed, you may email the completed copy and accompanying documents to us at office@ultimate-tax.com.au or print out and mail the documents to us

Name: _____

Address: _____

Phone/Mobile: _____

Email: _____

Date of birth: _____

Tax file number: _____

Occupation: _____

Private health cover: Please provide annual statement _____

INCOME:

- | | | |
|--------------------------|--|--|
| <input type="checkbox"/> | PAYG Payment Summary from employer/s | |
| <input type="checkbox"/> | PAYG Payment Summary from Centrelink | |
| <input type="checkbox"/> | Interest income from banks | List each account separately |
| <input type="checkbox"/> | Dividend statements | |
| <input type="checkbox"/> | Managed Fund distribution statements | |
| <input type="checkbox"/> | Capital gains information (share or property buy & sell contracts) | |
| <input type="checkbox"/> | Foreign income | |
| <input type="checkbox"/> | Rental income | Refer to our Ultimate Rental Checklist |
| <input type="checkbox"/> | Business income | Refer to our Ultimate Business Checklist |
| <input type="checkbox"/> | Distribution from partnership or trust | |

EXPENSES	TOTAL AMOUNT (\$)	WORK USE %
Accounting fees		
Donations to charities		
Work related car expenses		
- How many KM travelled for work activities		
- Work related % if logbook kept	Will need to contact for more details	
Protective clothing or uniforms		
Laundry for uniforms		
Work related self education expenses		
Union fees		
Subscriptions/membership		
Stationery		
Telephone/Mobile		
Internet		
Home office - hours per week		
Personal super contributions statement		
Income protection insurance statement		
Other expenses - please list		

Liability limited by a scheme approved under Professional Standards Legislation.