

Gorrell Long Robertson

Tax Return Checklist 2007/08

IF DIFFERENT TO OUR ESTIMATE:
PLEASE REMEMBER TO BRING LAST YEARS ASSESSMENT NOTICE FROM THE
ATO WHICH SHOWED YOUR REFUND OR TAX PAYABLE

(yes/no/na)

INCOME

- ◆ Group certificates (**Both copies please**) _____
- ◆ Centrelink Group Certificates/Letters _____
- ◆ ETP Group Certificates & Rollover Forms _____
- ◆ Interest received on bank accounts _____
- ◆ Business income and expenses details _____
- ◆ Shares – Dividend Slips (generally 2/year) (**Paid** between July 07 to June 08) _____
- ◆ **If any existing Investments sold: (shares, Managed Funds etc)** _____
 - Cost of shares and date purchased _____
 - Sale price and date sold _____
- ◆ Annual Trust Distribution Taxation Statements. _____
- ◆ Rental Property- Income _____
 - Agent Statements _____
 - Loan Statements _____
 - Rates _____
 - Insurance _____
 - Repairs _____
 - Travel (km's travelled) _____
 - Other Expenses _____
- ◆ Foreign income details _____
- ◆ Any other income _____

DEDUCTIONS

Car expenses

- ◆ If you travelled less than 5,000 work related kms - a reasonable estimate of the number of work related kilometres you travelled during the year and the car details;
or _____
- ◆ If you travelled more than 5,000 work related kms - a 12 week logbook plus the date purchased and cost of your car, lease/HP agreements, receipts for rego, insurance, repairs & services, fuel & oil. _____

Travel expenses e.g. Air Fares, Taxis , Parking _____

Uniform and compulsory clothing expenses including purchases, repairs/alterations, dry cleaning. _____

