



ACCUMUL8 ACCOUNTANTS
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Focal Point, 18 Second Avenue
MAROOCHYDORE QLD 4558

2011 Individual Income Tax Return Checklist for Accumul8 Accountants

Tax File Number: / / ABN:

Are you an Australian resident? YES/NO/UNSURE.....

Name:

Mr/Mrs/Ms/Miss:

Name changed since last return? YES/NO

If YES, previous name:.....

Postal Address:

Postal address changed from last tax return? YES/NO

Address:.....

Date of birth: / /

Telephone: (H) (W) (M)

Email:

Occupation:

Spouse details (if applicable):

Do you want your refund to be deposited directly into your bank account? YES/NO

If YES, provide bank details BSB: Account Number:

Account name:

Special Note:

To assist us with preparing your Income Tax Obligations and to keep our fee to you as economical as possible, please

- Provide the documentation to us at one instance once ALL of the information is available, and
- If you are waiting on documents from another source please wait until all documents are received by you before making your appointment or providing your information to us.

Please forward details to our office PO Box 5609 MAROOCHYDORE BC QLD 4558 or email consult@accumul8.com.au

INCOME - PLEASE SUPPLY ALL DOCUMENTS

- Salary or wages (PAYG Summary)
- Australian Government allowances and payments like newstart, youth allowance and Austudy payment
- Australian Government pensions and allowances
- Australian superannuation lump sum payments
- Interest
- Dividends
- Distributions from partnerships and/or trusts
- Foreign source income (including foreign pensions) and foreign assets or property
- Rent
- Capital Gains (sale of assets)
- Other income (please specify)

OTHER INFORMATION REQUIRED

- Private Health Insurance Details
- Medical Expenses if over \$2,000
- Are you entitled to the Medicare levy exemption or reduction in 2010? (If yes, please specify)
- Do you have a HECS/HELP liability or a student supplement loan debt?

Education Tax Offset:

Did you pay for textbooks or computer expenses for your school aged children?

We will need details of the child's name and year level, as well as receipts for the expenses.

- Child support paid in 2010 / 2011 year
- 2010 Notice of Assessment

DEDUCTIONS - PLEASE SUPPLY ALL DETAILS / CALCULATIONS

- Work related car expenses
- Work related travel expenses
- Work related uniform and other clothing expenses
- Work related self-education expenses
- Other work related expenses examples;
 - a) Union Fees, Registrations and Subscriptions
 - b) Telephone/Internet
 - c) Tools
 - d) Equipment
 - e) Printing and Stationery
 - f) Interest and Dividend Deductions
 - g) Gifts or Donations
 - h) Cost of Managing Tax Affairs
 - i) Personal Superannuation Contributions
 - j) Other Deductions (Please Specify)

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Did you know that we offer the following Services?

Please circle as applicable

- | | |
|--|----------|
| Home Loans – Do these require a health check? | Yes / No |
| Investment Loans – Do these require a health check? | Yes / No |
| Are you considering borrowing? | Yes / No |
| Do you have life or income protection insurance, would you like it reviewed? | Yes / No |
| Are you confident you are adequately insured, would you like it reviewed? | Yes / No |
| Would you like your Superannuation reviewed? | Yes / No |
| Would you consider investment strategies that maximise taxation? | Yes / No |
| Would you like to hear about Audit Insurance? | Yes / No |