

WSC Caringbah

Income Tax Return Checklist

For the year ended 30 June 2010

Name:			
Your Occupation:			
<i>Please complete this checklist and return to us with all relevant information so that we can prepare your 2010 tax return in a timely manner.</i>			
			Please circle
NEW ITEMS REQUIRED FOR 2010 TAX RETURNS:			
1.	Did you Salary Sacrifice any Superannuation?	Y	N
2.	Did you make any super contributions in order to get the Government Super Co-contribution?	Y	N
3.	Did you receive and Tax-free Government pensions?	Y	N
4.	Did you pay and child support during the year? <i>(Please provide details, including child maintenance expenditure)</i>	Y	N
			Please circle
INCOME:			
1.	Did you receive any PAYG Payment Summaries (Group certificates)? <i>(Please attach originals)</i>	Y	N
2.	Did you receive an Eligible Termination Payment for the year? <i>(Please attach original ETP Statement)</i>	Y	N
3.	Did you receive any Taxable Allowances or Pensions from Centrelink? <i>(Please attach original statement)</i>	Y	N
4.	Did you receive any Other Pension? <i>(Please provide details)</i>	Y	N
5.	Did you receive any income from business? <i>(Refer to the business checklist for details)</i>	Y	N
6.	Did you receive any interest during the year? <i>(Please provide details below)</i> Bank: Amount <i>(your share only)</i> 	Y	N
7.	Do you have any shares in companies which paid dividends during the year (including dividends reinvested)? <i>If so, please attach statements for dividends paid from 1 July 2009 to 30 June 2010.</i>	Y	N
8.	Did you receive any income from managed funds or unit trusts during the year? <i>(Please provide details including copies of Annual Tax Statements)</i>	Y	N
9.	Did you buy or sell any assets during the year that resulted in a capital gain? <i>(For share sale and purchase enclose evidence. For properties, refer to property checklist)</i> Purchase Date: Amount: Sale Date: Amount:	Y	N
10.	Did you borrow to purchase any asset that has derived income or capital gain? <i>(Please provide details of borrowing and interest paid during the year including copies of all loan statements. For property refer to property checklist)</i>	Y	N

11.	Did you receive any income derived from primary production? <i>(If so, please contact the office for more details)</i>	Y	N
12.	Did you receive any payment during the year that you are unclear if it is taxable, e.g. Royalties? <i>(If so, please provide details)</i>	Y	N
13.	Did you receive any income from a foreign source, e.g. employment, pension or investment income? <i>(If so, please provide details)</i>	Y	N
14.	Were you paid any bonuses from Life Insurance Bonds or Friendly Society Bonds? <i>(If so, please provide details)</i>	Y	N
DEDUCTIONS: WORK RELATED EXPENSES > \$300			
Please circle			
15.	Did you use your motor vehicle for business related purposes? <i>Methods available:</i> 1. Set rate per km up to 5000 business kms <i>(provide details of business or work kms travelled)</i> 2. 12% cost of car method <i>(provide details of cost of car)</i> 3. 1/3 actual operating cost method <i>(provide details of operating costs)</i> 4. Log book method <i>(provide details of operating costs & log book percentage)</i> <i>Should you require further information about which method to use please contact our office.</i> Should the motor vehicle be under finance please provide details of purchase / finance contract if not previously provided.	Y	N
16.	Did you incur any travel expenses relating to your employment that have not been reimbursed by your employer? <i>(If so, please provide details)</i>	Y	N
17.	Did you incur a cost in purchasing or maintaining a work-related uniform, occupation specific? <i>(Provide details)</i> Date: Amount: Type of purchase:	Y	N
18.	Did you incur any self-education expenses? <i>(If so, provide details below. If you have a HECS or HELP liability please provide the current balance outstanding)</i> Date: Amount: Details:	Y	N
19.	Did you purchase any assets or incur any expenditure in respect to work-related tasks? <i>(Must be expenditure specifically incurred in earning an income)</i> <i>(If so, please provide details)</i> Date: Amount: Description: Private Usage:	Y	N
20.	Do you work outdoors and incur expenditure on protection from the sun, e.g. sunscreen, sunglasses? <i>(Please provide details)</i> Date: Amount: Description:	Y	N
21.	Did you make a tax deductible donation or gift to charity? <i>(Please provide details)</i> Date: Amount: Description:	Y	N
22.	Did you incur any other work-related expenses such as home office, computer equipment or software, telephone or mobile phone, tools and equipment, union fees, subscriptions, journals and/or periodicals? <i>(Please provide details)</i> Date: Amount: Description:	Y	N

