



JJ & Co Accounting Pty Limited

Personal Tax Return Document Checklist

Book your appointment online: www.jjcoaccounting.com.au

Or call / text to **0424 902 233**

Please use this checklist and bring any relevant information with you or simply email to us:

jo@jjcoaccounting.com.au

Income	Yes	NA
Payment summaries for salary and wages / Employee share scheme		
Lump sum and termination payment statement		
Government pension statement / Superannuation pension statement		
Interest income and dividend statement		
Distribution from partnership or trust		
Managed fund annual statement		
Foreign income		
Buy and sell contract for shares if any share was sold		
Deductions		
Motor vehicle logbook and car expenses		
Motor vehicle work related kilometres		
Work related parking, tolls, accommodation, flight		
Protective uniforms, laundry, sun protection items		
Self-education expenses		
Work related equipment or tools		
Professional union and membership fee		
Work related phone, internet expenses and number of hours working at home		
Interest and bank fee on investment loan		
Donation to charity		
Tax agent fee for last year		
Income protection insurance		
Others		
A copy of last year tax return for our first year client		
Private health insurance statement & Spouse taxable income		
Rental income and expenses if owning investment property (see page 2)		

Rental Property Information Collection Sheet

Address: _____

Date property was acquired: _____ Acquisition cost: \$ _____

If sold during the year, date of sale: _____ Ownership _____ %

Tax Return Info	What document to look for	Total
Income		\$ _____
Rental income received	Agent annual statement	\$ _____
Water usage rebate	Agent annual statement	\$ _____
Insurance recoveries	Agent annual statement	\$ _____
Expenses		
Advertising expenses	Agent annual statement	\$ _____
Body corporate fee	Agent annual statement / invoices	\$ _____
Cleaning	Agent annual statement	\$ _____
Council rates	Agent annual statement / invoices	\$ _____
Gardening	Agent annual statement	\$ _____
Insurance	Invoices	\$ _____
Loan interest and bank fee	Loan bank statement	\$ _____
Land tax	Invoices	\$ _____
Legal fee	Invoices	\$ _____
Pest control	Agent annual statement	\$ _____
Agent's commissions	Agent annual statement	\$ _____
Repair	Agent annual statement / invoices	\$ _____
Replace or Renovation	Invoices	\$ _____
Postage and stationery	Agent annual statement	\$ _____
Travel	Invoices / Diary	\$ _____
Water rates	Agent annual statement / invoices	\$ _____
GST	Agent annual statement	\$ _____
Letting fees	Agent annual statement	\$ _____
Building write off	Tax depreciation report	\$ _____
Depreciation on equipment	Tax depreciation report / invoices	\$ _____

For rental property first rented or sold during the financial year, please supply the following:

Settlement statement on purchase & sale	
Stamp duty cost on purchase	\$ _____
Loan established cost on purchase (for 1 st year rented property)	\$ _____
Legal fee on purchase & sale	\$ _____
Tax depreciation report	
Fee paid for tax depreciation report	\$ _____
Date property first or last rented	____/____/____

Should you wish to discuss any of the content of this schedule or any other tax or accounting related matter please contact us at **JJ & Co Accounting 0424 902 233** or email jo@jjcoaccounting.com.au