

Individual Checklist



COOPER'S
ACCOUNTING

Information required if applicable (please also fill out Personal Details checklist also)	
Full Name	
Full Address	
Contact Number	
Email	

Income- if applicable	Yes/No
Employment PAYG Summaries	
Centrelink/ Government Payments PAYG Summaries	
Bank statements showing Interest earned on ALL accounts	
Dividend Statements (normally two per year per shares)	
Eligible Termination Payments PAYG Summaries	
Annuities & Super Stream Payments PAYG Summaries	
Lump sum Super Payments PAYG Summaries	
Managed Funds Annual tax Statement	
Foreign Source Income	
Buy /Sell contracts for any Shares sold	
Employee Share Scheme Tax statement	
Partnership Distribution statement(including copy of partnership's tax return)	
Trust Distribution statement(including copy of trust tax return)	
Personal Services Income PAYG summaries	
Rental Property Annual tax statement (please fill in Rental property checklist on website)	
Supply any other income not listed above	

Worked Related Deductions - receipts or evidence of following if applicable	Yes/No
Laundry,at Home, Drycleaning or Laundromat	
Uniforms for work including Non slip shoes etc	
Protective Wear, safety boots, safety glasses, sunglasses, hats, sunscreen etc	
Self Education Expenses- Fees , Books, Computer, Travel etc	
Tools and equipment for work	
Union Fees,	
Subscriptions /professional memberships	
Courses ,Seminars	
Registration fees, work place tickets	
Internet and % used for work purposes	
Phone and % used for work purposes	
Home office - days used for work purposes or % of floor space used	

PO BOX 2241 GREENHILLS NSW 2323

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Email: Helen@coopersaccounting.com.au Website: www.coopersaccounting.com.au

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Printing , Stationery and Postage Expenses	
Costs of any Electronic devices and % used for work purposes over \$300	
Donation over \$2 to registered Charities (not raffles tickets, boys town lotteries)	
Tax agents Fees and Litigation Expenses	
Software, antivirus and apps used for work purposes	
Managed funds and foreign income expenses	
Any other expenses not listed above	

Other Deductions - receipts or evidence of following if applicable	Yes/No
Income Protection Insurance (not life insurance or if paying through your super)	
School building fund levy if school is a deductible gift recipient	
Interest and Dividend expenses	

Motor Vehicle used for Work	Yes/No
Kilometres used for work max 5,000 and evidence i.e diary . spreadsheet	
Or Logbook filled out & following Motor vehicle expense receipts	
Fuel, Insurance, greenslip, rego, cleaning, repairs	
If leased, financed or loan supply all documents	

Other Documents Required if applicable	Yes/No
Private Health Annual statement	
PAYG Instalments Paid	
Spouses details including Taxable and Exempt Income	
Personal checklist filled out if NEW or details changed from last year	
New Clients Last years tax return for depreciation & loss details etc	
New clients or completing on line , Identity documents, i.e Licence , medicare	
Super Contributions for spouse	
Net out of pocket Medical expenses for disabilities aids, aged care etc over \$2330 or over \$5504 for higher incomes, please bring receipts if unsure	
If lived in a remote Area of Australia,, childrens details and their Adjustable taxable income	
Attributed personal Services Income PAYG Summaries (for Companies)	
If you are a business please fill out Business checklist	

Please note: List is a brief guide only and may not cover every circumstance so best to supply all Income and receipts

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