

VINS TAXATION SERVICES

REGISTERED TAX AGENTS & ACCOUNTANTS

SUITE 4, GROUND LEVEL, 169 MACQUARIE ST, PARRAMATTA NSW 2150

PHONE NO: 02 98937877 MOBILE: 0 413 362 797 FAX NO: 02 98939566 EMAIL: taxret2002@yahoo.com.au

MAXIMIZE YOUR TAX REFUND LET A QUALIFIED ACCOUNTANT PREPARE YOUR TAX RETURN

Your Name.....

NAME(S) AND BIRTHDATES(S) OF CHILD DEPENDANT(S).....

ADDRESS.....POSTCODE.....()

PHONE NO.....FAX NO..... EMAIL.....

INCOME CHECK LIST

- 1 Salaries/wages
- 2 Allowances/benefits/earnings/tips etc
- 3 Bonuses-Life insurance etc
- 4 Capital gains-shares real estate
(Description, Date of Purchase & Sale, Cost & Sale price etc)
- 5 Consultancy/contract income
- 6 Dividends/distributions
- 7 Eligible termination payments
- 8 Foreign source income
- 9 Government allowances/benefits
- 10 Government pensions/annuities
- 11 Income equalization
- 12 Interest from Banks, building societies & credit Union
- 13 Lump sum payments
- 14 Partnership/trusts
- 15 Profit from business
- 16 Rent
- 17 Other.....

DOCUMENT REQUIRED

- 1 Group certificates/credit vouchers/other records on income/instalments
- 2 Tax file numbers(including spouse)
- 4 Vehicle log book/Travel Diary
- 5 Investment income- dividend, interest (bank, ATO) rent details
- 6 Private health insurance details
- 7 Property sale details- settlement papers
- 8 Retirement/termination Payment Summary
- 9 Social security Payment - Payment Summary
- 10 Super / Annuity Payment - Payment Summary
- 11 Bank details - BSB Number, Account Number and Account name
- 12 If the rental property is new - Settlement papers
- 13

HOW TO ORGANIZE YOUR RECORDS

Keeping receipts may be crucial to the success of your claims for deductions.
Tip: Sort your work related expense receipts & other documents in to different categories using envelopes labelled with those categories

DEDUCTIONS CHECKLIST

1 Car Expenses (if used for work puposes and expenses not reimbursed by the employer)

Fuel

5 Self Education Expenses(Course should be related to your job and it is for improve your skill, knowledge, income but not for getting the job)

Course fee

9 Expenses relating to Investment / Rental Property

Council rates

Repairs
Service
Insurance
Rego
Interest
others

2 Travelling expenses (Expenses incurred for work purposes but not reimbursed by the employer)

Air bus taxi fares, accommodation & Meal
Parkings
Toll

3 Uniform & Laundry expenses

(if it is compulsory / protective uniform)

Cost of Uniform

Dry Cleaning

Laundry

Protective clothing

Steel capped Shoes

Helmet

Sun glasses

Hat

Sunscreen lotion / Hand wash

4 Cost of Managing tax affairs

Tax agent fee

Travelling expenses

Tax advisor's Fee

Books
Internet uses
Travelling
Stationary
Postage
Uses of computer
Uses of equipments
Home Office Expenses
Equipment lease expenses

6 Other work related Expenses

Membership fee of professional body
Union Fee

Internet uses

Telephone

equipments < \$300

Income Protection Insurance

Home Office Expenses

Seminars/Conference/in services

Depreciation on equipments costing >\$300

Tools

Licence Fee

7 Expenses - Interest / Dividend income

Interest on loan

Seminars

Bank Charges

Financial Advisor's Fee

8 Donations

(to registered charitable organisation)

Starta Fee
Agent Fee
Water Charges
Insurance
Interest
Repair & Maintenance
Stationary
Postage
Travelling
Bank Charges
Land tax
Stamp Duty (in ACT only)
Legal Expenses
Pest Control
Depreciation (as per quantity surveyor report)
Capital allowance (as per quantity surveyor report)
Cleaning
Advertising

NOTE:

Claims for expenses must be substantiated if the expenses claimed are more than \$300. Substantiation record must be kept for 5 years from the later due date for lodging the return or when it is lodged. The following types of evidence are treated as satisfying the substantiation rule;

1. Bank statement 2. Credit Card Statement 3. email receipts 4. Paper copies of receipts 5. Log book 6. Travel diary