RBK ADVISORY
ACCOUNTING + WEALTH + FINANCE

2017 Individual Checklist

Our services include Tax Returns, Bookkeeping, Financial Planning, Mortgage Broking, Asset finance and much more.

INCOME –

Please provide evidence that is relevant for you:

- ☐ Salary or Wages (PAYG Payment Summary / Group Certificate)
- ☐ Allowances, Tips, Earnings, Directors Fees
- ☐ Employer Lump Sum Payments, Employment Termination Payments (ETP)
- ☐ Government Allowances including Youth Allowances, Newstart and Austudy
- ☐ Australian Government Pensions and/or Superannuation Income Streams
- ☐ Australian Superannuation Lump Sum Payments
- ☐ Gross Interest for each account
- ☐ Dividends received on Shares and Managed Fund Statements
- ☐ Employee Share Schemes
- ☐ Distributions from Trusts and/or Partnerships
- ☐ Capital Gains (include the sales proceeds and all the costs related to acquiring the asset)
- ☐ Foreign Source Income
- ☐ Rental Property Income (please provide your annual summary from the real estate agent if available)
- ☐ Any Other Income

DEDUCTIONS –

Please provide evidence that is relevant for you:

- ☐ Work Related Car Expenses (Cents per km up to 5000 business km's or Log book method)
- ☐ Work Related Travel Expenses
- ☐ Work Related Uniform Expenses (including protective clothing)
- ☐ Work related Self-Education Expenses (travel to course, course fees, books & stationery)
- ☐ Work related Expenses (telephone, union fees, tools and equipment, computer, subscriptions, printing & stationery, internet cost, sun protection and any other work related deductions incurred)
- ☐ Costs incurred if you received income from interest and/or dividends eg, interest paid
- ☐ Donations (where receipts were given for donations over $2)
- ☐ Last Year Tax Agent Fee
- ☐ Income Protection

OTHER INFORMATION –

Please provide evidence that is relevant for you:

- ☐ Private Health Insurance Statement
- ☐ Spouses Income
- ☐ Any other documentation that you believe is relevant for your tax (bring it along and we will tell you whether it should be reported or claimed)
- ☐ BSB and Account Number (to have refunds paid directly into your bank account)
- ☐ A copy of previous year tax return (for new clients only)
- ☐ If you want a mortgage health check/review please bring your most recent home loan statement
- ☐ If you want a health check on your superannuation and personal insurances please bring your most recent superannuation statement
- ☐ For a tailored rental property checklist please email admin@rbkadvisory.com.au or speak to your accountant

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