



Taxation Services

REGISTERED TAX AGENT • ACCOUNTANT • BUSINESS ADVICE

CJ Taxation Services
Phone: (07) 5442 6679
Fax: (07) 5442 5688
Email: info@cjtaxationservices.com.au

Po Box 786
Cooroy QLD 4563

2016 Individual Income Tax Return Checklist

Tax File Number: _____ ABN: _____

Are you an Australian resident? YES/NO/UNSURE

Name: Mr/Mrs/Ms/Miss:

Name changed since last return? YES/NO Preferred Name:

If YES, previous name:

Postal address:

.....

Residential address:

.....

Date of Birth:/...../.....

Telephone: (H) (W) (M)

Email:

Occupation:

Spouse details (if applicable):

Dependant (1) Dependant (2).....

Dependant (3) Dependant (4)

Preferred contact: Email Mobile Home Phone

***** The tax office now require your refund to be deposited directly into your bank account*****

Please provide bank details BSB: Account Number:

Account Name:

Legal and Insurance matters

We take this opportunity to remind you to review your insurance and ensure your wills and powers of attorney are up to date.



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INCOME PLEASE SUPPLY ALL DOCUMENTS

- Salary or wages (PAYG Summary)
- Australian Government allowances and payments like newstart, youth allowance and Austudy
- Australian Government pensions and allowances
- Australian Superannuation lump sum payments
- Interest
- Dividends
- Distributions from partnerships and/ or trusts
- Foreign source income (including foreign pensions) and foreign assets or property
- Rent
- Capital gains (Sale of assets)
- Other income (please specify)

OTHER INFORMATION REQUIRED

- Private Health 'annual tax statement'
- Are you entitled to the Medicare levy exemption or reduction in 2016? (if yes, please specify)

DEDUCTIONS- PLEASE SUPPLY ALL DETAILS / CALCULATIONS

- Do you have HECS/HELP liability or a student supplement loan debt?
- Child support paid in the 2015/2016 year
- Number of dependents _____
- Work related car expense
- Work related travel expense
- Work related uniform and other clothing expenses
- Work related self-education expenses
- Other work related expenses examples:
 - a) Union fees, registrations and subscriptions
 - b) Telephone/ internet
 - c) Sun protection
 - d) Tools
 - e) Equipment
 - f) Printing and stationary
 - g) Interest and dividend deductions
 - h) Gifts or donations
 - i) Cost of managing tax affairs
 - j) Personal super contributions
 - k) Income protection insurance
 - l) Other deductions (please Specify)

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**Please forward details to our office
CJ Taxation Services**

PO Box 786 Cooroy QLD 4563

**Or Email
Info@cjtaxationservices.com.au**

Special Note:

To assist us with preparing your Income Tax obligations and to keep our fee to you as economical as possible, please

- Provide the documentation to us at one instance once ALL of the information is available, and
- If you are waiting on documents from another source please wait until all documents are received by you before making your appointment or providing your information to us.