



CAPE YORK ACCOUNTING

WESTCOURT

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TAX RETURN REQUIREMENTS – INDIVIDUAL

INCOME:

PAYG Summaries (Old Group Certificates) – for all employers, pensions etc

- ✓ Centrelink PAYG Summary – for Newstart, Sickness benefits, Austudy, pensions and Parenting Payment (Single or Partnered)
- ✓ ETP PAYG Summary – if any superannuation cashed during year.
- ✓ Investment income including:
 - Interest received from bank accounts, credit unions, building societies etc
 - Share dividends – usually 2 per year (whether taken as cash or dividend re-investment)
 - Managed funds – need Annual Tax Statement
 - Distributions – from partnerships and trusts
 - Capital Gains – if any income-producing assets (e.g. property/shares etc) are sold.
 - Rental Income – derived from renting out a property (including deductions)
- ✓ Foreign Income – interest, dividends, pension or other income

DEDUCTIONS:

- ✓ Motor vehicle details and record of kilometres travelled, if private motor vehicle is used for work, other than driving to and from employment.
- ✓ Work related travel expenses – if required to travel overnight for work
- ✓ Uniform or corporate wardrobes – must have logo and be compulsory to claim
- ✓ Approved protective clothing purchases
- ✓ Self education expenses (must be directly connected to your current employment.)
- ✓ Any expenses incurred for sun protection
- ✓ Any expenses incurred in obtaining investment income
- ✓ Donations/gifts to registered charities (also political party membership and donations)
- ✓ Tax agents fees from previous year

HECS / HELP / SFSS

- ✓ Higher Education Loan Program (HELP OR HECS) statements and
- ✓ Student Financial Supplement Scheme (SFSS) statements
- ✓ Trade Supplement Loan (TLS)

TAX OFFSETS: (require spouses taxable income for Family Benefits)

- ✓ Zone rebate – dates and locations of all remote areas visited
 - dependant children/s dates of birth, taxable incomes, and school attended
- ✓ Medical expenses – if receipts after re-imbursments exceed \$1500
 - may claim Doctors, Dentists, Optical, Pharmaceutical etc.

PRIVATE HOSPITAL INSURANCE

- ✓ Private Health Insurance rebate – letter from health fund (mailed out in July) detailing the rebate

REFUND OPTIONS

- ✓ If refund is to be banked (quickest method) need full BSB and bank account number

Yvonne Anderson and Associates Pty Ltd ATF
THE ANDERSON FAMILY TRUST
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