



Individual Tax Return Information Checklist 2010

Client name: _____ Email: _____

Information required	Supplied	N/A
1. PAYG Payment Summaries (Group Certificates)	<input type="checkbox"/>	<input type="checkbox"/>
2. Lump Sum and Termination payments	<input type="checkbox"/>	<input type="checkbox"/>
3. Government pensions and allowances	<input type="checkbox"/>	<input type="checkbox"/>
4. Other pensions &/or annuities	<input type="checkbox"/>	<input type="checkbox"/>
5. Tax statements of managed investment funds	<input type="checkbox"/>	<input type="checkbox"/>
6. Interest income from banks and building societies	<input type="checkbox"/>	<input type="checkbox"/>
7. Dividend statements for dividends received	<input type="checkbox"/>	<input type="checkbox"/>
8. Contracts and details of shares sold or purchased	<input type="checkbox"/>	<input type="checkbox"/>
9. Contracts and details of investment real estate sold or purchased	<input type="checkbox"/>	<input type="checkbox"/>
10. Rental property statements from real estate agent and details of other expenditure incurred. Refer to BIS Cosgrove website for a more detailed checklist for this item - www.cosgroveco.com.au	<input type="checkbox"/>	<input type="checkbox"/>
11. Work related expenses including (broadly);		
(a) Car expenses	<input type="checkbox"/>	<input type="checkbox"/>
(b) Travel expenses	<input type="checkbox"/>	<input type="checkbox"/>
(c) Clothing & laundry expenses	<input type="checkbox"/>	<input type="checkbox"/>
(d) Self education expenses	<input type="checkbox"/>	<input type="checkbox"/>
(e) Other work-related expenses Refer to BIS Cosgrove website for a more detailed checklist for this item www.cosgroveco.com.au	<input type="checkbox"/>	<input type="checkbox"/>
12. Motor vehicle logbook (where required)	<input type="checkbox"/>	<input type="checkbox"/>

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| 13. Donations to charities | <input type="checkbox"/> | <input type="checkbox"/> |
| 14. Private health insurance tax statement | <input type="checkbox"/> | <input type="checkbox"/> |
| 15. Net medical expenses (if over \$1,500 after rebates for you and your dependants) | <input type="checkbox"/> | <input type="checkbox"/> |
| 16. Expenses eligible for the Education Tax Refund. Refer to BIS Cosgrove website for more detailed information regarding claim eligibility for this offset - www.cosgroveco.com.au | <input type="checkbox"/> | <input type="checkbox"/> |
| 17. Income protection premiums paid | <input type="checkbox"/> | <input type="checkbox"/> |
| 18. Anything else you feel may be relevant | <input type="checkbox"/> | <input type="checkbox"/> |