



GRUBERS BECKETT
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Individual Tax Return Checklist - Advanced

Investment Property

- Water charges
- Bank fees
- Details of when property was rented, including any rental or agent statements
- Date when property was purchased
- Capital costs
- Interest on loans
- Advertising fees
- Agent fees
- Body corporate fees
- Borrowing expenses
- Cleaning, repairs and maintenance expenses
- Council rates
- Gardening/lawn mowing fees
- Insurance premiums paid
- Land tax details
- Travelling to inspect property

Other Deductions

- Superannuation if self employed
- Financing lease statements

Income

- Foreign sourced income
- Partnership distribution
- Rental income
- Deductable amount for pension/annuities
- Capital gains tax statements (details of any assets sold)
- Lump sum payments e.g. eligible termination payment
- Payment statements
- Trust distribution statements
- Tax statements from fund managers
- Bank statement – showing interest and fees
- Share dividend statements
- Contract notes for buy/sell transactions
- Tax statements from stockbrokers
- Income stream statements
- Life insurance bonus policy statements

Other Useful Information

- Credit card statements
- Bank statements
- Cheque butts
- Loan statements