



# O'Brien Bousamra & Co Pty Ltd

Individual's Tax Return Checklist Year: \_\_\_\_\_

Full name:						
Home address:						
Email address:						
Occupation:						
Telephone:	Home:		Business:		Mobile:	
Date of birth:						
Spouse's name:				Spouse's date of birth:	___ / ___ / _____	
	Estimate of taxable income if not O'Brien Bousamra client				\$	

TO: O'Brien Bousamra & Co Pty Limited.

Please proceed with completion of tax work using the material I have attached, as indicated with a tick () below:

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Signature

\_\_\_ / \_\_\_ / \_\_\_\_\_

Date

INCOME	
<input type="checkbox"/>	PAYG Summaries, Government Pension Statements
<input type="checkbox"/>	Allowances / other benefits not on PAYG Summaries
<input type="checkbox"/>	Lump Sum Payments / ETP Payment Summary Statements
<input type="checkbox"/>	Australian Annuity or Superannuation Pension Statement
<input type="checkbox"/>	Interest Received / TFN Tax
<input type="checkbox"/>	Dividends received (including dividend reinvestment)
<input type="checkbox"/>	Partnership / Trust Distributions
<input type="checkbox"/>	Business Income – <b>please complete Business Income Checklist</b>
<input type="checkbox"/>	Consulting Income / Directors fees
<input type="checkbox"/>	Capital gains on disposed assets (purchase and sale information of assets sold)
<input type="checkbox"/>	Foreign Pensions / Annuities
Rental Properties: - Please provide a copy of your year to date rental statement.	
<input type="checkbox"/>	Agent Fees and Commissions
<input type="checkbox"/>	Body Corporate Levies
<input type="checkbox"/>	New Loan Costs
<input type="checkbox"/>	Council & Water Rates
<input type="checkbox"/>	Loan interest and Bank Charges
<input type="checkbox"/>	Repairs and maintenance
<input type="checkbox"/>	Gardening and Pest Control
<input type="checkbox"/>	Furniture and fitting replacement
<input type="checkbox"/>	Water Rates
<input type="checkbox"/>	Travel Costs
<input type="checkbox"/>	Quantity Surveyor's report
<input type="checkbox"/>	New Asset

DEDUCTIONS	
<input type="checkbox"/>	Motor Vehicle Expenses – <b>please complete Motor Vehicle checklist or spreadsheet (from obb.net.au)</b>
<input type="checkbox"/>	Work related Travel Expenses
<input type="checkbox"/>	Work related taxis, tolls, parking
<input type="checkbox"/>	Protective clothing / Compulsory uniform costs
<input type="checkbox"/>	Work related self education expenses
<input type="checkbox"/>	Union Fees (not on PAYG Summaries)
<input type="checkbox"/>	Professional Association subscriptions
<input type="checkbox"/>	Work related home office expenses - please specify business proportion ____%
<input type="checkbox"/>	Trade journals, books, professional libraries
<input type="checkbox"/>	Tools of Trade
<input type="checkbox"/>	Income Protection / Sickness & Accident insurance
<input type="checkbox"/>	Work related telephone / internet expenses - please specify business proportion ____%
<input type="checkbox"/>	Work related computer / software - please specify business proportion ____%
<input type="checkbox"/>	Superannuation contributions (self employed only)
<input type="checkbox"/>	Expenses related to dividend / interest income
<input type="checkbox"/>	Gifts or donations (not raffles)
<input type="checkbox"/>	Tax agent costs (if not O'Brien Bousamra)

CREDITS / REBATES	
<input type="checkbox"/>	Private Health Details (hospital cover)
<input type="checkbox"/>	Dependant's details (number of children if not previously advised or if changed)
<input type="checkbox"/>	H.E.L.P (HECS) debt
<input type="checkbox"/>	Annual Medicare & Private Health Fund Statements
<input type="checkbox"/>	Medical Expenses – over: \$2,000 for 2012 tax year or \$5,000 for 2013 tax year.
<input type="checkbox"/>	Medicare Exemption forms
<input type="checkbox"/>	Undeducted Purchase Price of a Pension / Super Contributions on behalf of spouse
<input type="checkbox"/>	

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Name

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Tax Year

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Signature

\_\_\_ / \_\_\_ / \_\_\_\_\_

Date

Thank you for completing this document. If you have any questions in relation to any of the checklist items, please call our office on (02) 9907 2733 or email at [admin@obb.net.au](mailto:admin@obb.net.au). Checklists can be downloaded from our website [www.obb.net.au](http://www.obb.net.au).