

**Freddy Huang** B.A. CPA  
**Lynne Lin** B.A. CPA

Suite 103, 370 St Kilda Road  
MELBOURNE VIC 3004

PO Box 7092, St Kilda Road  
MELBOURNE VIC 8004

Tel: (03) 9686 0808

Fax: (03) 9686 0828

Email: [info@hltpartners.com.au](mailto:info@hltpartners.com.au)

[www.hltpartners.com.au](http://www.hltpartners.com.au)

## Individual Tax return checklist 2009/2010

<b>Income</b>	<b>Documentation required</b>
Salary or wages	Pay as you go (PAYG) payment summaries from all your employers throughout the year
Centrelink payments or pensions	PAYG payment summary
Eligible termination payments (ETP)	ETP payment summary
Reportable fringe benefits tax (FBT)	PAYG payment summary
Interest or dividends	Bank or dividend statements
Managed funds or trusts	Annual tax summary
Foreign income	Bank statement or notice
Rent	Agent report or statements
Capital gains – property or shares	Purchase or sale of assets documents
Other income	Records of the amounts received
<b>Tax offsets</b>	<b>Documentation required</b>
Spouse	Your spouse's income details
Superannuation annuity or pension	Payment summary from your payer and any details on deductible or rebatable amounts
Private health insurance	Letter from your health fund including health fund identification code
Medical expenses	Details and receipts
30% child care rebate	Receipts and/or child care statements and reconciliation letter from the Family Assistance Office

<b>Work related expenses</b>	<b>Documentation required</b>
Motor vehicle expenses	Receipts and/or log book
Travel expenses	Receipts
Uniform or protective clothing	Receipts
Self education expenses	Receipts
Other expenses	Receipts

<b>Other deductions</b>	<b>Documentation required</b>
Interest or dividend deductions	Bank or dividend statements
Gifts or donations	Receipts
Undeducted purchase price (UPP) of annuity	Details as provided by your superannuation fund
Prior year tax agent fees	Receipt
Prior year losses	Previous tax return
UPP of foreign pension	Pension documentation
Rental property expenses	Agents report or receipts
Other information	Documentation required
Superannuation contributions for spouse	Contribution details and documentation

Important: This is not advice. Clients should not act solely on the basis of the material contained in this Bulletin. Items herein are general comments only and do not constitute or convey advice per se. Also changes in legislation may occur quickly. We therefore recommend that our formal advice be sought before acting in any of the areas. The Bulletin is issued as a helpful guide to clients and for their private information. Therefore it should be regarded as confidential and not be made available to any person without our prior approval.