AJS ACCOUNTING

TAX RETURN CHECKLIST P.1

-INDIVIDUAL

(03) 5338 8878
info@ajsaccounting.au
447 Doveton Street

CLIENT INFORMATION

Client Name	
Address (If different from prior year)	

Please ensure you read through each question & attach any applicable documents / provide amounts or details.

INCOME

		Applicable YES/NO	Docs Attached YES/NO	No. of Docs Attached
Salary & Wages Please provide PAYG Payment Summary(s)				
INVESTMENT INCOME	Interest Income (Bank statements)			
	Dividend Income (Divident statements			
	Distrubution Inome (Annual Tax statement)			
	Rental Income (Please refer to our **Rental Property Checklist**)			
	Capital Gains - (buy and sell information)			
Business Income Please refer to our **Business Income Checklist**				
OTHER INCOME	Employer Lump Sums (Payment Summary			
	ETP (Payment Summary)			
	Government Allowances (Payment Summary)			
	Employee Share Schemes (Payment Summary)			
	Other - Give details			