BLANCHARD Accountants

www.blanchardgroup.com.au 1300 TAX 777

2014 – 2015 TAX YEAR – DOCUMENTS REQUIRED FOR TAX RETURN

NAME: _____ TFN: _____

e-mail: _____ Phone: _____

Occupation: _____

INCOME DOCUMENTS

- ☐ Payment Summary (s)
- ☐ Bank Interest Statement (s)
- ☐ Dividend Statement (s)
- ☐ Other Income

EXPENSE / DEDUCTIONS DOCUMENTS

	Total $ for category
☐ Work-Related Car Expenses	
☐ Work-Related Travel	
☐ Work-Related clothing, laundry and dry-cleaning	
☐ Work-Related Tools	
☐ Computer, Internet, Stationery	
☐ Telephone	
☐ Self Education	
☐ Interest and dividend deductions	
☐ Gifts or Donations	
☐ Cost of Managing Tax Affairs	
☐ Other Deductions	
☐ Private Health Insurance	

Basic rules and records you need to keep

Different rules apply to different deductions. For most work-related expenses, you must have written evidence to prove your claims if your total claims exceed $300. The records you keep must prove the total amount, not just the amount over $300.

Make sure all your receipts / tax invoices or copies are attached to this page