



**Focus on  
what you do best,  
and we'll focus  
on your Tax!**

At **360five**, we love what we do.  
And that includes Income Tax Returns!

**Our fees are competitively  
priced including:**

Standard Tax Return:  
**\$295**  
for an individual Annual Return

+ Investment Property:  
**\$95**  
per property

+ Business Schedule:  
from **\$275**  
per business

(Prices include GST and may be subject to change depending on your situation.)

We are skilled tax professionals that can help you to claim what you are entitled to, so that you can maximise any refunds due to you.

Please use the checklist over the page and attach any relevant supporting documents so that we can complete your Return efficiently and ensure you claim everything you are entitled to.

Contact **360five** today on **(02) 6188 3880** or email us at [enquiries@360five.com.au](mailto:enquiries@360five.com.au)



Tax agent  
25426110



**CHARTERED ACCOUNTANTS**  
AUSTRALIA + NEW ZEALAND

# Individual Tax Return Checklist

## INCOME

✓	<b>Payment Summaries</b> <ul style="list-style-type: none"> <li>Salary &amp;/or wage income, lump sum and termination payments</li> <li>Allowances, earnings, tips, director's fees etc.</li> <li>Superannuation/Pension income streams</li> <li>Government Pensions / Allowances</li> </ul>
✓	Interest income from banks and building societies
✓	Dividend statements for dividends received or reinvested
✓	Annual Tax Statements from Managed Funds
✓	Details of any Foreign investment or interest income
✓	Details of any income from Employee share schemes
✓	<b>Business income:</b> Please provide a detailed summary of the income and expenses in addition to your ABN
✓	<b>Rental Property Income:</b> Please provide total income or Agent Annual statement, loan statements showing interest paid, Depreciation/Quantity Surveyor's report, all other expenses (Rates, Land Tax, Water, Insurance, Repairs etc.)

## OFFSETS & REFUNDS

✓	<b>Private Health Insurance:</b> Please provide tax and rebate entitlement statement
✓	IAS statements / details of PAYG instalments paid
✓	<b>Spouse details:</b> <ul style="list-style-type: none"> <li>Full name</li> <li>Date of birth</li> <li>Taxable income &amp; Exempt income</li> </ul>

## DEDUCTIONS

✓	<b>Motor vehicle expenses</b> <ul style="list-style-type: none"> <li>Work kilometres travelled:</li> <li>If you kept a logbook, please attach a summary of all your motor vehicle expenses and the business use percentage shown in your logbook</li> </ul>
✓	<b>Interest deductions:</b> expenses incurred in relation to interest income you have received
✓	<b>Dividend deductions:</b> expenses incurred in relation to dividend income you have received or reinvested
✓	<b>Self-education:</b> Please provide details of expenses
✓	Travel expenses (fares and accommodation)
✓	Work related uniform, occupation specific or protective clothing, laundry, dry cleaning expenses
✓	<b>Donations:</b> Please provide details of any donations to charities or building funds
✓	<b>Other Work-related expenses:</b> Please provide receipts/invoices for any Union fees, registrations, tools, subscriptions, memberships, telephone, computer, internet, home office expenses, seminars, conferences etc.
✓	<b>Tax agent fees:</b> Please provide receipts/invoices
✓	<b>Personal superannuation contributions:</b> Please provide supporting documentation
✓	<b>Income Protection Insurance:</b> Please provide your annual statement showing total premium paid for the year

## Your details

Full Name
Contact Number/s
Email Address
Residential Address
Postal Address
Date of Birth

Australian Resident for tax purposes	YES / NO
Tax File Number	
Occupation	
Bank Account Name	
BSB #	Account #