



# PERSONAL INJURY INFORMATION CHECKLIST

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A STEP-BY-STEP GUIDE



Business Strategy | Expert Witness | Valuations

# Personal Injury Information Checklist.

THE INITIAL DOCUMENTS YOU NEED TO COLLECT TO EFFECTIVELY INFORM AN ACCOUNTANT AND A LAWYER OF YOUR SITUATION.

## **Pre-injury Information:**

Circumstances of your injury

Demographic information

Current Employment, employment history and expected future employment

Spouse/partner's and children's income tax returns (if required)

Details of earnings 3 years prior to injury (i.e. PAYG, Income Tax Returns or individual income tax summaries, Payslips)

Copy of superannuation statements (for all complying funds) 3 years prior to injury

Any other source of income for 3 years prior to injury

Details of any Discretionary, Unit or Hybrid Trusts to which the Plaintiff has been a beneficiary

## **Post-injury Information:**

Details of earnings 3 years post-injury (i.e. PAYG, Income Tax Returns or individual income tax summaries, Payslips)

Copy of superannuation statements (for all complying funds) 3 years post-injury

Any other source of income for 3 years post-injury

Letters of offer

Employment Contract

Superannuation statements

Notifications from ATO (i.e. current ATO running balance), if applicable

Curriculum Vita

Details of any Discretionary, Unit or Hybrid Trusts to which the Plaintiff is or may become a beneficiary

**Plaintiff's Business:**

In the event that the plaintiff owns (part of wholly) and operates a business it is likely that the business further will need to be assessed in order to determine whether further losses have occurred. The following listing is not exhaustive, but will allow work to commence immediately:

Copy of business (entity) financial statements 3 years prior injury, if applicable.

Any BAS statements available

Franchise Agreement, if applicable

Payroll details for the past three to five years

Narrative with regards to major events in the history of the business

Future Care Costs and Other Extraordinary Expenses, if applicable

Other relevant documents underpinning material assumptions. For example, letters from debtors providing evidence of foregone work

**NEED HELP?**

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