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## INDIVIDUAL TAX RETURN CHECKLIST

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### ❖ INCOME

- ☐ PAYG Payment Summary
- ☐ Allowances, earnings, benefits, directors' fees
- ☐ Lump sum and termination benefits
- ☐ Centrelink benefits, pensions and allowances
- ☐ Superannuation income streams
- ☐ Interest received on all bank accounts and term deposits
- ☐ Dividends received from share investments – both cash and reinvested
- ☐ Employee Share Scheme tax statement
- ☐ Trust distribution statements, including tax statements
- ☐ Partnership distributions
- ☐ Capital Gains for any property or investments sold
- ☐ Foreign source income - including overseas pensions

### ❖ DEDUCTIONS – WORK RELATED

- ☐ Motor Vehicle – if claiming cents per km method then diary entries must support kms claimed. If claiming a percentage of total vehicle expenses then a log book must be kept for 12 weeks
- ☐ Other work-related travel expenses such as tolls, taxis, public transport, overseas and interstate travel not reimbursed by your employer
- ☐ Purchase of compulsory or protective uniform including laundry expenses
- ☐ Union fees
- ☐ Purchase of tools or trade equipment
- ☐ Self education expenses including seminars, books, fees, stationery, travel and parking. Must be related to further your current career and not a new qualification in a different field
- ☐ Home office expenses – number of hours worked at home required
- ☐ Telephone / internet expenses related to work
- ☐ Books, journals and subscriptions relating to your work or investments
- ☐ Income Protection Premiums

❖ **INVESTMENT PROPERTIES**

- ☐ Rental Income (an annual statement from a property manager is sufficient)
- ☐ Any rental property expenses not included on a property manager's statement
- ☐ Interest paid on any investment property loan or copy of loan statements
- ☐ Tax Depreciation Schedule (if you have arranged for one to be prepared)
- ☐ If you have purchased a property during the year then we will also need:
  - Contract of Sale
  - Settlement Statement
  - Bank Loan Fees

❖ **OTHER**

- ☐ Taxable income of your spouse if we don't prepare their return
- ☐ Annual Private Health Insurance tax statement
- ☐ Receipts for any donations made to registered charities
- ☐ Prior year tax agent fees paid
- ☐ Personal Super Contributions – acknowledgement from your super fund required
- ☐ Any after tax super contribution made on behalf of your spouse
- ☐ Details of your bank account so the ATO can process your tax refund electronically