

Individual Income Tax Return Checklist

Please use this checklist and provide any relevant information to assist in preparation of your tax return. If you are unsure of any income or deduction, please include it and we will determine its relevance in the tax return.

Please provide Tax Return from last year

Income

- Payment Summaries
- Lump Sum and Termination Payment Summaries
- Australian Government Payment Summaries / Statements
- Interest income from banks and building societies
- Dividend statements for dividends received or reinvested
- Statements from Managed Funds
- Other income from:
 - Rental properties
 - Business
 - Foreign income
 - Capital gains
 - Employee share schemes

Deductions

Work related expenses including:

- Motor vehicle
- Travel (fares and accommodation)
- Uniforms/work-wear
- Self-education and professional development
- Union, registrations, tools, subscriptions, memberships
- Home office expenses; cleaning, telephone/internet, electricity (business % / hours used)
- Seminars and/or Conferences
- Telephone, computer, internet
- Any other costs incurred earning your work income
- Receipts for gifts or donations to charities or building funds
- Costs of managing tax affairs (last year's tax return preparation)
- Cost incurred for Income protection insurance
- Other deductions relevant to earning other income above (from businesses, rental properties, etc. – such as interest on loans, cost of sales/purchases, tools and equipment, and office/stationery expenses)

Offsets and Refunds

- Private Health Insurance (PHI) Statement
- IAS statements or details of PAYG instalments paid
- Spouse details including taxable and exempt income
- Your bank account details, including the BSB and Account Number for refund