

Individual Tax Return Checklist

This checklist is to assist you when determining what we require to complete your income tax return each year.

Income

- Employment Income – PAYG Payment Summaries
- Pension Income/Centrelink
- Employment Termination Payment (ETP)
- Annuity & Superannuation Income Stream Statements/ Lump Sum Payments
- Bonuses from Life Companies and Friendly Societies
- Interest Earned
- Dividends Statements
- Trust Distribution and Capital Gains Statements
- Foreign Source Income
- Business Income
- Employee Share Scheme Statements

Tax Deductions

- Work Related Motor Vehicle Expenses (make & model required, number of kilometer travels and log book may be required)
- Work Related Travel Expenses (E.g. meal, accommodation, tolls)
- Work Related Clothing & Laundry Expenses
- Work Related Self-Education Expenses
- Dividend & Interest Deductions
- Tax Deductible Gifts & Donations
- Income Protection Insurance
- Union Fees
- Home Office Expenses
- Seminars
- Overtime Meals (If received an allowance)
- Tools & Equipment
- Computer, Internet & Software Expenses
- Memberships & Subscriptions
- Telephone & Internet
- Sun Protection Receipts, eg Hats, Sunglasses and Sunscreen
- Superannuation Contributions

Rental Property Information

- Real Estate Agents Annual Rental Statement
- Rental Income
- Advertising for Tenants
- Bank Loan Statements (for Interest, Fees & Charges)
- Body Corporate Levies
- Cleaning

- Council Rates
- Gardening & Lawn mowing
- Insurance
- Improvements & Replacements
- Land Tax
- Pest Control
- Property Management Fees/Commission
- Repairs & Maintenance
- Stationery, Telephone & Postage
- Water Rates Notices

For New Investment Properties

- Copy of contract and solicitor's settlement letter
- Date the Property was first available to rent
- Date the Property was built
- Depreciable Items (E.g. Hot Water System, Stove)

Capital Acquisitions & Disposals

- Copy of Contract and Settlement Statements from both purchase and sale (E.g. Shares, Investment Properties)
- Details any associated costs eg. solicitors, brokers fees, stamp duty, commissions etc.

Other Information

- Child Support Agency Payments
- Out of Pocket Medical Expenses for disability aids, attendant care & aged care
- Annual Private Health Insurance Statement
- Dependents – Name and DOB
- Zone Rebate – please provide dates lived in a remote area
- Superannuation - Spouse Contributions
- Please advise of any changes to your bank account details (Bank account name, number & BSB)

New Clients

- Last year's Tax Return and Notice of Assessment
- Previous year's Accounting Fees
- Bank account details (Bank account name, number & BSB)

We have compiled [a list of our top useful links](#) to help assist you. If you need any help don't hesitate to contact our friendly staff.