

Individual Tax Return Checklist

When you come in to see us at tax time, please bring the following items to assist us in completing your tax return quickly.

Income

- Employment Income
- Centrelink / Pension Income
- 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, log book may be required)
- Work Related Travel Expenses (E.g. tolls, accommodation, meals)
- 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 & Mobile Phone
- Sun Protection Receipts
- Personal Superannuation Contributions & Notice of Intent to Claim

Other Useful Information

- Child Support Agency Payments
- Private Health Insurance Statement
- Dependants – Name, DOB
- Zone – If living in a remote area (Dates)
- Spouse Contributions to Superannuation

Investment Property Information

- Annual Rental Agent Statement
- Rental Income
- Advertising for Tenants
- Bank Loan Statements (for Interest & Charges)
- Body Corporate Levies
- Cleaning
- Council & Water Rates
- Gardening & Lawn mowing
- Insurance
- Land Tax
- Pest Control
- Property Management Fees/Commission
- Repairs & Maintenance
- Stationery, Telephone & Postage
- Replacements & Improvements

For New Investment Properties

- Date the Property was first available to rent
- Date the Property was built
- Depreciable Items (E.g. Air conditioning, Hot Water System, Stove)
- Quantity Surveyor Report
- Settlement statements, contracts, legals from purchase

Capital Acquisitions & Disposals

- Annual tax statements
- Buy and sell details of shares/crypto (reports from trading platforms)

New Clients

- Tax file number
- Basic contact details
- Last year's Income Tax Assessment
- Last year's Tax Return
- Previous year's Accounting Fees
- Bank account details (Bank account name, number & BSB)

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