

Income Tax Return

Checklist – Individuals

Please use this checklist and upload any relevant information as we cannot be sure that the Australian Tax Office Portal will have these details available.

INCOME

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

DEDUCTIONS

- ☐ Work related expenses:
 - ☐ Motor vehicle
 - ☐ Travel (fares and accommodation)
 - ☐ Uniforms/work-wear
 - ☐ Self-education and professional development
 - ☐ Union, registrations, tools, subscriptions, memberships
 - ☐ Home office, seminars, conferences
 - ☐ Telephone, computer, internet
 - ☐ Any other costs incurred earning income
- ☐ Donations to charities or building funds
- ☐ Income protection insurance

OFFSETS AND REFUNDS

- ☐ Health insurance and rebate entitlement statement
- ☐ IAS statements or details of PAYG instalments paid
- ☐ Spouse details including taxable and exempt income

TAX REFUNDS – the Tax Office no longer issues refunds by cheque so you must provide your bank account details, including the BSB and Account Number.



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