

Income Tax Return Checklist – Individuals

The following checklist outlines the documents and information that we will ask you about when preparing your Income Tax Return. Please help us by bringing the necessary information regarding the relevant items below.

Income

- PAYG Payment Summary
- Government payments (such as Newstart, Age Pension, and Youth Allowance)
- Bank interest received
- Statements of dividends received
- Rental property income
- For share sales, statements of purchase and sale
- For sales of rental properties, relevant contracts of sale and purchase, and capital expenses
- Annuity statements with undeducted purchase price
- Annual Tax Statement for managed trust distributions
- Foreign income documentation
- Employer Termination Payment
- Statements regarding any other income such as employee share schemes, director fees or contract work

Deductions

- Work related expenses, not covered by your employer, such as union dues, stationary, tools, and phone expenses
- Registration expenses for employment
- Rental property statements from the real estate agent and details of any other expenditure incurred
- If you claim motor vehicle expenses, the number of kilometers travelled or logbook record
- Other work related travel expenses, such as meals, accommodation, parking, and tolls
- Premiums for income protection insurance
- Donations to charities

Additional Information Required

- Private Health Insurance Annual Statement

Financial Health Check

- Latest superannuation statement
- Personal Insurance policies

Please note that we need your bank account details to be able to process any tax refunds