



Individual Tax Return Checklist

Income:

- Brief Job Description
- Payment Summaries
- Employment Termination Payment Summary
- Super Lump Sum or income stream Payment summary
- Bank interest
- Dividend statements
- Employee Share Scheme document
- Annual Tax Statement from Managed Funds
- Foreign Income or pensions
- Rental income
 - o Rental Statement (annual or summarised)
 - o Council Rates
 - o Water Rates
 - o Insurance
 - o Body Corporate
 - o Loan Interest
 - o Depreciation Schedule
 - o Maintenance & Repair Receipts
 - o Land tax
- Small Business Income & Expenses (summarised)
- Capital Gain Information
 - o Sale of Shares
 - Purchase Date & Price (including brokerage)
 - Sale Date & Price (including brokerage)



Individual Tax Return Checklist

o Sale of Property

- Purchase Date & Price (purchase contract)
- Stamp Duty / Transfer Fees on purchase
- Conveyancing Fees on purchase and sale]
- Sale date & price (sale contract)
- Real Estate fees for sale
- Details & Receipts of any renovations or improvements and depreciation

Expenses:

- Motor Vehicle

- o Set Rate –Diary of work related kms (no more than 5000km can be claimed)
- o Logbook – 12-week logbook of work-related and personal travel, as well as odometer

readings at the start and end of financial year

- Petrol Receipts (totalled)
- Registration & Insurance
- Repair & Service Invoices (totalled)
- Loan or Chatter Mortgage documents to calculate interest payments
- Purchase documents to calculate depreciation

- Work-related Travel Expenses

- o Parking
- o Tolls
- o Accommodation
- o Airfares
- o Taxi/Uber

- Uniform/Workwear expenses

- o Logoed uniform
- o Protective workwear (inc. Hi Vis)
- o Work boots or protective footwear



Individual Tax Return Checklist

- Self-Education Expenses

o Self-education expenses (for current job only) totalled

- Course fees (exc. HECS)
- Textbooks
- Travel to study, work to study
- Stationary / Printing

- Other work-related expenses

o (Over \$300, must have receipts)

- Union / Registration Fees
- Subscriptions / Memberships
- Tools (\$300+ depreciated)
- Seminar / Conferences
- Mobile – 4 week diary showing work related % as well as total paid for that year
- Internet – 4 week diary showing work related % as well as total paid for the year
- Books & Reference Materials (\$300+ depreciated)
- Computer equipment & Software (for depreciation)
- Home office:
 - Diary for year showing total hours worked-, 67c per hour from home can be claimed
- Any other work-related expenses
 - Donations
 - Tax Agent Fees
 - Income Protection Insurance
 - Personal Superannuation Contributions (with an 'Intent to claim superannuation' document for Superannuation Fund)
 - Private Health Insurance Statement
 - Spouse details & Income (taxable & exempt)
 - Number of dependent children
 - Bank Details for refund