



INDIVIDUAL | CHECKLIST

INCOME TAX RETURN

To assist you with gathering the necessary information and documents for the preparation of your **Individual Income Tax Return**, we now provide you with a tailored checklist for your convenience. We recommend that this checklist is used as a guide to gather all appropriate documents. Failure to do so may mean we can't complete your tax return in the most efficient and timely manner.

Documents/Information	Information Required	Not Applicable
INCOME		
PAYG payment summaries (e.g. from employers)	<input type="checkbox"/>	<input type="checkbox"/>
Lump Sum payments (e.g. Employment Termination Payment)	<input type="checkbox"/>	<input type="checkbox"/>
Partnership and distribution statement, including copy of tax returns	<input type="checkbox"/>	<input type="checkbox"/>
Documentation of any foreign source income	<input type="checkbox"/>	<input type="checkbox"/>
Interest earned, including term deposits summary of all dividends received, including imputation credits	<input type="checkbox"/>	<input type="checkbox"/>
Managed fund annual tax statement and capital gains tax statement	<input type="checkbox"/>	<input type="checkbox"/>
Buy/sell contract notes for shares (if any shares were sold)	<input type="checkbox"/>	<input type="checkbox"/>
WORK RELATED DEDUCTIONS		
Details of depreciable assets bought during the year (e.g. laptops/tools etc.)	<input type="checkbox"/>	<input type="checkbox"/>
Details for home office expenses (electricity, gas and telephone)	<input type="checkbox"/>	<input type="checkbox"/>
Professional journals/trade magazines/memberships /subscriptions/union fees	<input type="checkbox"/>	<input type="checkbox"/>
Summary for continuing professional development courses, seminars or education	<input type="checkbox"/>	<input type="checkbox"/>
Summary of all motor vehicle expenses (if used for work purposes), including business kilometers travelled	<input type="checkbox"/>	<input type="checkbox"/>

Vehicle logbook percentage for motor vehicle expenses (if using the logbook method)

Summary of other work related deductions (e.g. protective clothing/uniform, tools and equipment, mobile and travel expenses)

WORK RELATED DEDUCTIONS

Summary of gifts or donations of \$2 and over

Expenditure incurred in managing tax affairs (e.g. tax agent's fees)

Expenditure incurred in earning interest, dividends or other investment income (e.g. financial advice)

Income protection insurance premiums

Information

Information Required

Not Applicable

RENTAL PROPERTIES

Records detailing rental income received (annual statement from property agent)

Summary of interest paid on investment loan for the financial year

Rental property expenses (i.e. council rates, water charges, repairs and maintenance, land tax and insurance)

Details of depreciable assets or capital works on the property

If the property was disposed of during the income year, information relating to dates and costs associated with disposal of the property

OFFSETS / REBATES

Details of dependents, including their age, occupation and income

Private health insurance statement

OTHER INFORMATION

Summary of PAYG instalments paid

Any other information that you think is relevant or have provided in the past

Please complete the following details:

PLEASE NOTE: The ATO will no longer be issuing refund cheques and all refunds will be via EFT, so please ensure you have all your banking details to avoid any delays.

Account Name:

BSB Number:

Account Number:

Financial Institution:

Thank you for compiling all your information.

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