



## INCOME TAX RETURN CHECKLIST: INDIVIDUAL

Please use this checklist and bring any relevant information with you while coming for the appointment as this information may not be available on the ATO's portal for us to download.

### INCOME

- ☐ Pay As You Go (PAYG) Summaries
- ☐ Current Employment Payslip
- ☐ Income from foreign sources
- ☐ Partnership distribution
- ☐ Rental property
- ☐ Deductible amount for pension/annuities
- ☐ Capital Gains Tax statements (details of any assets sold during the financial year)
- ☐ Lump sum and termination payments summaries
- ☐ Social security, pensions, allowance statements
- ☐ Trust distribution statements
- ☐ Tax statements from fund managers
- ☐ Bank statements - showing interest and fees
- ☐ Dividend statements
- ☐ Contract notes for buy/sell transactions
- ☐ Tax statements from stockbrokers
- ☐ Statement for income received from life insurance payments

### DEDUCTIONS

- ☐ Receipts or evidence of work related deductions e.g. tools, car (kms and parking), home office, travel, laundry, equipment, tools, uniform
- ☐ Receipts for self-education expenses e.g. fees, books, computer, Uni and TAFE tuition fees
- ☐ Union fees
- ☐ Income Protection Insurance

### INVESTMENT RELATED DEDUCTIONS

- ☐ Interest/fees on borrowing for investment purposes (bring statements)
- ☐ Asset purchase/sale agreements

### OFFSETS

- ☐ Private health insurance statement
- ☐ IAS Statements or details of PAYG instalments paid
- ☐ Dependants - name, DOB, and legal responsibilities
- ☐ Zone details – maybe eligible for an offset if living in a remote area
- ☐ Sole parent/spouse/housekeeper/low income
- ☐ Details of spouse (income, DOB etc.)
- ☐ Superannuation pension rebates
- ☐ Medical receipts
- ☐ Imputation credit information from dividend statements

### INVESTMENT PROPERTY

- ☐ Body corporate fees/council rates
- ☐ Cleaning charges/water charges
- ☐ Repairs and maintenance/pest control
- ☐ Depreciation Schedule
- ☐ Interest on loans
- ☐ Legal fees/land tax
- ☐ Property agent fees/commission
- ☐ Stationery, telephone, postage, advertising costs
- ☐ Sundry rental costs
- ☐ Borrowing expenses
- ☐ Gardening/lawn mowing
- ☐ Insurance
- ☐ Capital works deductions (Building write off)
- ☐ Travel expenses
- ☐ Quantity surveyor's depreciation report (if available)

### OTHER DEDUCTIONS

- ☐ Tax agent fees
- ☐ Superannuation (if self-employed)
- ☐ Receipts of gifts/donations made to charities and building fund
- ☐ Financing lease statements

Call us today on **00000000** for an appointment

Date: \_\_\_\_\_

Day: \_\_\_\_\_

Time: \_\_\_\_\_