

### Income Tax Return Checklist – Individuals

#### Personal Details:

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_ DOB: \_\_\_\_\_ Gender: \_\_\_\_\_  
Tax File Number: \_\_\_\_\_ Address: \_\_\_\_\_ Occupation: \_\_\_\_\_

#### 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 & accommodation)
  - Uniforms/work-wear
  - Self-education and professional development
  - Union, registrations, tools, subscriptions, memberships
  - Home office, seminars and 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 – Please provide your bank account details

Account Name: \_\_\_\_\_ BSB: \_\_\_\_\_ Account Number: \_\_\_\_\_

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Certified Practising Accountant | Business adviser | Tax specialist | Loan assistant

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