

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 (Please provide the income and expense summary)
 - Foreign income
 - Capital Gains
 - Employee Share Schemes

Deductions

- Work related expenses:
 - Motor vehicle Work related Travel _____ km (Please provide the expense summary if logbook method used)
 - 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: _____

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

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