

## **INDIVIDUAL TAX RETURN CHECKLIST**

### **Personal Details**

<b>Name:</b>	<b>Occupation:</b>
<b>Phone No:</b>	<b>Mobile:</b>
<b>ABN:</b>	<b>Tax File No:</b>
<b>Date of Birth:</b>	
<b>Email Address:</b>	
<b>Home Address:</b>	
<b>Postal Address:</b>	
<b>Income</b>	<b>Information Provided Y/N/Not Applicable</b>
Finalised Income Statement (Finalised) Available on MYGOV Portal	
Partnership Distribution Statement/s	
Trust Distribution Statement/s	
Documentation in relation to foreign source income, foreign assets or property	
Bank Statements stating interest earned, including from Term Deposits (information can be obtained from the ATO Portal)	
Dividend Statements (information can be obtained from the ATO Portal)	
Employee Share Scheme Statements (information can be obtained from the ATO Portal)	
Managed Fund annual tax statement and capital gains tax statement	
Buy/sell contract notes for shares (if any shares were sold during the year)	

<b>Work – related deductions</b>	<b>Information Provided Y/N/Not Applicable</b>
Details of depreciable assets bought during the year (eg Laptops, hardware)	
Details and receipts (over \$300) for home office expenses	
Light and Power – Total hours spend working from home.	
Professional journals/trade magazines	
Professional memberships/subscriptions	
Receipts for self-education expenses	
Receipts of other work-related deductions eg protective clothing, uniform expenses, tools and equipment and travel.	
Vehicle logbook for motor vehicle expenses (if using the logbook method) e.g. Petrol costs for the year, Insurance, Registration, Repairs and Maintenance, Interest paid on finance of motor car	
<b>Other Deductions</b>	<b>Information Provided Y/N/Not Applicable</b>
Receipts for Donations of \$2 and over to registered charities	
Expenditure incurred in managing tax affairs (e.g. Tax Agents fees)	
Expenditure incurred in earning interest, dividend and other investment income	
Income Protection insurance premiums	
<b>Rental Properties</b>	<b>Information Provided Y/N/Not Applicable</b>
Date when property was purchased, including details of joint ownership if applicable.	
Period property was rented out during the income tax year	
Property Agent's Annual Statement	
Loan statements for property showing interest paid for the income tax year.	
Expenses incurred such as land tax, water charges, insurance premiums, Council rates, Body corporate Fees, Repairs and Maintenance to the property, Land Tax.	
Details of depreciable assets bought or disposed of during the year or a Quantity Surveyor's Report.	
If the property was disposed of during the income tax year, information relating to dates and costs associated with the disposal of the property.	

<b>Offsets/Rebates</b>	<b>Information Provided Y/N/Not Applicable</b>
Number of dependants.	
Private Health Insurance Annual Statement.	