

Individual Income Tax Return - Checklist

Name: _____ Occupation: _____

INCOME:

Attached/NA

- PAYG Payment Summaries
 - * Number of payment summaries: _____
- Eligible Termination Payment (ETP) Summaries
- Centrelink Payments or Pensions
- Superannuation lump sum payments
- List of all interest received
- Dividends - all dividend notices inc. DRP's
- Details of employee share schemes vested/exercised
- Annual tax statement from managed funds or trusts
- Foreign Income, inc. working income, foreign pensions etc
- Share sales: Original purchase details & sale details including -
 - * Date of purchase, No. of shares, Total purchase cost
 - * Date of sale, No. of shares, Total sale price
- Property sales (except residence): Original purchase details & sale details including -
 - * Date of purchase, purchase price, purchase costs (stamp duty, etc)
 - * Date of CONTRACT, sale price, costs incurred on sale, cost of improvements to property
- Sale of other assets: purchase details & sale details

DEDUCTIONS:

- Income protection insurance
- Donations or charitable gifts
- Interest & dividend deductions - ie margin loan on shares
- Personal superannuation contributions - pls supply written confirmation from fund
- Private health insurance - annual statement
- Details of any work related expenses including but not limited to:
 - * Kms travelled in your motor vehicle for work journeys (excluding home to work)
 - * Actual costs (fuel, rego etc) if you have kept a logbook or drive a ute, van or bus.
 - * Work related travel expenses eg - accomodation, meals not reimbursed
 - * Work related uniform, protective clothing, protective shoes/boots, dry cleaning & laundry
 - * Cost of work related training, seminars etc
 - * Union fees, professional associations/memberships
 - * Work related tools & equipment
 - * Stationery, ink cartridges, computer equipment & software
 - * Work related subscriptions, journals, publications
 - * Home office Expenses - either hours worked at home or actual costs
- Any other information that you normally provide or that you feel is relevant

RENTAL PROPERTY: (see separate checklist for more detail)

- Annual rental statement from agent
- Property expenses not paid by agent eg. - rates, strata, insurance, interest, land tax etc
- Depreciation report if not provided previously

***Note: if you prefer a bank transfer you have not provided banking details previously, or they have changed, you must provide the new bank details prior to lodgement of return**