

Individual Tax Return Checklist

When you come to see us at tax-time, please bring the following items to assist in completing your tax return.

Income Earned Statements

- PAYG Payment Summaries (paper/digital copy or marked as 'tax ready' in your MyGov account)
- Allowances, Earnings, Tips, Directors Fees, Etc
- Employer Lump Sum Payments
- Employment Termination Payments
- Australian Government Allowances (Newstart, Youth Allowance, Austudy)
- Australian Government Pensions
- Australian Annuities & Income Streams
- Australian Superannuation Lump Sum Payments
- Personal Services Income & Labour Hire
- Interest Earned (Bank, Term Deposit, etc.)
- Dividends Received
- Employee Share Schemes
- Partnership & Trusts (Including Managed Funds)
- Capital Gains (Including Sale of Shares & Property)
- Foreign Source Income
- Business Income

New Clients

- Tax File Number
- Copy of Last Lodged Tax Return
- Photo Identification

Other Information

- Spouse & Dependent Details (Including Spouse's Taxable Income Figure)
- Any Child Support Paid
- Personal Superannuation Contributions Made
- Private Health Statement

Work Related Expenses

- Car Expenses
- Travel Expenses
- Gifts or Donations
- Income Protection Insurance
- Uniform Expenses Including Protective Clothing, Compulsory Uniform or Occupation Specific items
- Self education Expenses Including course Fees, Books, Stationery, Travel & Computer Consumables
- Other Work Related Expenses (E.g. Union Fees, Telephone, Tools, Subscriptions, Equipment & Home Office Expenses)
- Interest Deductions
- Dividend Deductions
- Taxation Expenses (Prior Year Tax Agent Fees)

Rental Properties

- Income Received
- Purchase Documents (If New Purchase)
- Rental Agent Statements
- Interest On Loans
- Body Corporate Fees
- Cleaning, Repairs & Maintenance Costs
- Council Rates
- Water Rates
- Insurance Premiums Paid
- Land Tax
- Capital Costs
- Bank Fees & Charges

Bank Institution Details

- BSB & Account Number

NOTE: The ATO requires supporting documentation for all tax deductions claimed, together with verification that you actually incurred the expense and that it is directly related to your income producing activity, not for personal use. There will be increased scrutiny by the ATO as work related tax deductions are deemed a key focus this tax season with risk of penalties for false or unsubstantiated claims.