

INCOME TAX RETURN CHECKLIST - INDIVIDUALS

Please use this checklist as a guide and bring all relevant information with you as we cannot be sure that the Australian Tax Office Portal will have these details available.

INCOME

- PAYG Payment Summaries
- Lump Sum and Termination Payment Summaries
- Government Payment Summaries, 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 property statements and expenses
 - Business income and expenses
 - Foreign income
 - Capital gains
 - Employee share schemes

DEDUCTIONS

- Work related expenses:
 - Motor Vehicle
 - Travel (fares and accommodation)
 - Uniforms/work-wear
 - Self-education and professional development
 - Union, registrations, tools, subscriptions, memberships
 - Home office, seminars, conferences
 - Telephone, computer, internet
 - Any other costs incurred earning income
- Donations to charities or building funds
- Income protection insurance

OFFSETS AND REFUNDS

- Private Health Insurance Annual Tax Statement
- Details of PAYG instalments paid, if any
- Spouse details including taxable and exempt income

TAX REFUNDS– the Tax Office no longer issues refunds by cheque so you must bring your bank account details, including the BSB and Account Number, with you to your appointment.