Individual Tax Return Checklist

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accountants + consultants

WHEN YOU COME IN TO SEE US AT TAX TIME, PLEASE USE THE FOLLOWING AS A CHECKLIST OF THINGS YOU NEED TO BRING WITH YOU:

INCOME

- ☐ PAYG Payment Summaries
- ☐ Personal Services Income (PSI) Payment Summaries
- ☐ Eligible Termination Payments
- ☐ Employee Share Scheme Statement
- ☐ Centrelink statement for government payments such as Newstart Allowance, Youth Allowance, Parenting Payment, Carer Payments & Pensions
- ☐ Any bank interest earned and bank statements if possible
- ☐ Trusts & Cash managed funds annual statements
- ☐ If any investments sold, i.e: shares, property or managed investments, all records of purchase and sale
- ☐ Any foreign income details
- ☐ Any other income details
- ☐ PAYG Payments Summaries – Superannuation Income Stream

DEDUCTIONS

- ☐ Any receipts for deductions of work related expenses
- ☐ Motor Vehicle Log Book, Expenditure & if applicable Motor Vehicle Finance Details
- ☐ Travel Diary
- ☐ Work Related Self Education Expenses
- ☐ Receipts for Donations
- ☐ Child support payments
- ☐ Share information – dividend statements
- ☐ If sold shares need purchase & sale details
- ☐ Rental income & Expenditure – Real Estate agents statements, Investment Loan statements, Receipts for rental property expenditure such as rates, insurance etc
- ☐ Any other deduction details

TAX OFFSETS & OTHER

- ☐ Private health fund annual letter
- ☐ If have a partner or spouse, their assessable taxable income and personal details
- ☐ Receipts for any medical expenses you have incurred during the financial year
- ☐ Bank account details – Account name, BSB & Account Number