Individual Tax Return Checklist

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1. Tick what you're sending. Skip anything that doesn't apply to you.

2. Send it through. Email admin@lawsonaccounting.com.au or drop into the office.

3. Not sure? Include it. We'd rather have too much than miss something.

Your details

Full name ______________________ Date of birth ______________

Address ______________________ Mobile ______________

TFN ____________ Occupation ____________ Email ______________

BANK ACCOUNT FOR YOUR REFUND

Name ______________ BSB ____________ Account ______________

This year, did you...

- ☐ Own a rental property
- ☐ Buy, sell or swap any crypto
- ☐ Change address, phone or bank details
- ☐ Sell shares, property or other assets
- ☐ Have a spouse or dependants
- ☐ Start or stop a job, or change employer

Income	PROVIDED
Income statements from each employer We can see most of these online - just tell us every employer you had this year	☐
Lump sum or termination payments (e.g. redundancy)	☐
Centrelink or other government payments	☐
Bank interest Including term deposits, savings and joint accounts	☐
Dividend statements, including reinvested dividends	☐
Managed fund or ETF annual tax statements	☐
Trust or partnership distribution statements	☐
Employee share scheme statement	☐
Foreign income, overseas pensions or assets held overseas	☐
Sole trader, ABN or Personal Services income e.g. Uber, Airtasker, DoorDash - income and expense summary, plus any BAS lodged	☐

Work-related deductions	PROVIDED
Car expenses A logbook and running costs, or a record of work kilometres (home-to-work trips don't count)	☐
Work travel - flights, accommodation, meals away overnight	☐
Working from home, phone and internet A record of hours worked from home for the whole year (roster, timesheet or diary) and your work-use %	☐
Tools, equipment, laptops and furniture Receipts showing the date bought and cost	☐
Uniforms and protective clothing Logo uniforms, hi-vis, steel caps and laundry - not everyday clothes	☐
Union fees, memberships, licences and subscriptions	☐
Courses, seminars and study related to your current job	☐
Any other costs you paid to earn your income	☐

Other deductions	PROVIDED
Donation receipts ($2 or more to registered charities)	☐
Income protection insurance Only policies held outside your super fund	☐
Investment costs - share loan interest, advice fees	☐
Personal super contributions you want to claim Your fund's letter acknowledging your notice of intent to claim - must be received before we lodge	☐
Tax agent fees paid for last year's return	☐

Health, family and offsets	PROVIDED
Private health insurance tax statement	☐
Spouse or de facto partner details Full name, date of birth and their taxable income for the year	☐
Number of dependent children	☐
Super contributions you made for your spouse	☐
PAYG instalments paid	☐

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Rental properties - one set per property	PROVIDED
New property: purchase contract and settlement statement Plus each owner's share if it's jointly owned	☐
Dates the property was rented, available, or used privately Include any time used by you, family or friends, or rented below market rate	☐
Agent's annual statement, or Airbnb / Stayz earnings reports	☐
Loan statement showing interest for the year Let us know about any refinance or redraw, and what the money was used for	☐
Council rates, water, land tax, insurance and body corporate	☐
Invoices for repairs, renovations or new appliances	☐
Depreciation schedule (if it's new or we don't have it)	☐

Capital gains - things you sold	PROVIDED
Shares or ETFs sold: buy and sell contract notes Including the original purchase, however long ago - a broker "realised gains" report is ideal	☐
Dividend reinvestment history for any shares sold	☐
Property sold: purchase and sale contracts, settlement statements Plus stamp duty, legal fees, agent commission and receipts for improvements	☐
If it was ever your home: dates you lived in it and dates it was rented	☐
Anything else sold - collectables, business or overseas assets	☐

Cryptocurrency	PROVIDED
Good to know: swapping one coin for another, or spending crypto, counts as selling it - not just cashing out to dollars.	
A list of every exchange and wallet you've used Including any accounts you've since closed	☐
Full transaction history (CSV export) from each one New to us for crypto? Export back to your very first purchase	☐
Crypto tax software report, if you use one (e.g. Koinly)	☐
Staking rewards, interest or airdrops received	☐
NFTs, DeFi, or crypto lost to scams or hacks	☐