

Income Tax Return Checklist for 2024

Optio Accountants

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What you don't need to supply:

This data is available to us from the tax office.
However you should check your records to
your completed return when sent for signing
Payment Summaries/Income Statements for
Employment
Pensions and Government Benefits
Employment Termination Payments

Interest from bank accounts
Dividend statements from Australian Listed companies

HELP/HECS and student loan statements
Private Health Insurance Statement

OTHER INFORMATION REQUIRED

Bank Account for Deposit of Refund

BSB No.

Account No.

Spouse's Income

\$ <input type="text"/>	Taxable Income
\$ <input type="text"/>	Reportable Fringe Benefits
\$ <input type="text"/>	Reportable Superannuation
\$ <input type="text"/>	Investment Losses
\$ <input type="text"/>	Rental Losses

What you do need to supply:

INCOME

YES NO

<input type="checkbox"/>	<input type="checkbox"/>	Annual Tax Report for distribution from trusts
<input type="checkbox"/>	<input type="checkbox"/>	Overseas income details
<input type="checkbox"/>	<input type="checkbox"/>	Life assurance & friendly society bonus details

<input type="checkbox"/>	<input type="checkbox"/>	Purchase & sale details in relation to rental properties, land, shares, etc. * contract dates & settlement statements for both sales & purchases * any other costs incurred
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<input type="checkbox"/>	<input type="checkbox"/>	Cryptocurrency Transactions
<input type="checkbox"/>	<input type="checkbox"/>	Dividend re-investment records (Dates/Costs)

RENTAL PROPERTIES

No. of weeks available for rent

No. of weeks actually rented

☐ Rental statement/s (from real estate agent)
showing income and expenses

☐ Expenses relating to rental property e.g. Rates,
Insurance, repairs, Body Corporate fees

☐ Loan statements

**If a new rental property - contact us for a list
of additional items needed**

SPOUSE SUPERANNUATION CONTRIBUTIONS

☐ Amount \$

DEDUCTIONS (Receipts and diaries required)

YES NO

<input type="checkbox"/>	<input type="checkbox"/>	Motor vehicle expenses / Log Book: * Odometer readings at 01/07/23 _____ & 30/06/24 _____ Log book records If log book not available No. of kms for work purposes Personal vehicle details: * Make & Model _____ * Date of Purchase _____ * Purchase Price \$ _____ * Registration No. _____
<input type="checkbox"/>	<input type="checkbox"/>	Fuel, Repairs, Maintenance, Insurance, Registration, RACQ required if not claiming c/km method
<input type="checkbox"/>	<input type="checkbox"/>	Work related travel expenses - e.g. Toll fees, Parking, Fares, Taxi, Airfares, Accommodation, Car Hire, Meals
<input type="checkbox"/>	<input type="checkbox"/>	Uniforms & protective clothing, dry cleaning, repairs
<input type="checkbox"/>	<input type="checkbox"/>	Work related study expenses-e.g. Fees, Textbooks, Stationery, Photocopying, Kms travelled (log book)
<input type="checkbox"/>	<input type="checkbox"/>	Union fees, registrations, professional memberships
<input type="checkbox"/>	<input type="checkbox"/>	Other work related expenses -e.g. Tools, Stationery Seminars, Reference Books, Sun Protection
<input type="checkbox"/>	<input type="checkbox"/>	Stationery, replacement tools, equipment purchased
<input type="checkbox"/>	<input type="checkbox"/>	Home Office - Daily Diary + Bill for phone, NBN, Electricity or Home Office - actual bills plus floor area details
<input type="checkbox"/>	<input type="checkbox"/>	Computer and Equipment purchase
<input type="checkbox"/>	<input type="checkbox"/>	Interest & dividend deductions
<input type="checkbox"/>	<input type="checkbox"/>	Income protection insurance
<input type="checkbox"/>	<input type="checkbox"/>	Deductible superannuation contributions
<input type="checkbox"/>	<input type="checkbox"/>	Gifts & Donations - To Registered Australian Charities
<input type="checkbox"/>	<input type="checkbox"/>	Financial Planning fees for ongoing advice
<input type="checkbox"/>	<input type="checkbox"/>	Previous Tax Agent's fee (if not Optio Accountants)