

2022|2023

INCOME TAX RETURN CHECKLIST

We have prepared this checklist to help you collate your information prior to coming in to see one of our tax specialists

Income

- ☐ Payment summaries are no longer issued so please check your myGov or give us a call to make sure your payment summaries are *"Tax Ready"* prior to your appointment
- ☐ The ATO data matching service does supply us with *some* information, but we still ask that you bring along:
 - ☐ Dividend Statements
 - ☐ Interest earned on bank accounts
 - ☐ Annual Tax Statements from Managed Funds
- ☐ You will need to supply the following as these are not covered by data matching:
 - ☐ Any insurance payouts such as income protection or workcover
 - ☐ Rent received on investment properties
 - ☐ Business income for sole traders/subcontractors
 - ☐ Any foreign income (including overseas pension)
 - ☐ Details of any asset sales such as shares, cryptocurrency or rental properties

Deductions

- ☐ Details of work-related expenses – hours worked from home, internet, mobile phone, tools, uniforms, union fees, stationery, subscriptions, memberships, conferences
- ☐ Total kilometres travelled for work purposes or valid logbook if travelled more than 5,000km along with motor vehicle running expenses (fuel, rego, insurance, repairs, interest paid on loans)
- ☐ Details of income protection insurance premiums
- ☐ Confirmation of your intent to claim personal superannuation contributions issued by the fund
- ☐ Work related travel – fares, accommodation, tolls, parking
- ☐ Self-education and professional development (if directly related to your current employment)
- ☐ Details of donations to registered charities
- ☐ Details of all expenses in relation to investment properties - advertising, body corporate, council rates, insurance, gardening, interest on loans, pest control, agent fees, repairs, depreciation
- ☐ Details of all business expenses, summarised and totalled

Additional Information Required

- ☐ Partner details including date of birth, taxable and exempt income, FBT and salary sacrifice super amounts
- ☐ Any spouse super contributions made
- ☐ Child support paid
- ☐ Private health insurance statement
- ☐ New clients, you will need to provide photo identification at your appointment

