



## HOSPITALITY TAX CHECKLIST

*Use this checklist to maximise your deductions and ensure that you collect together all the tax documentation you need to complete your tax return this financial year!*

### INCOME:

- ☐ PAYG Summaries
- ☐ Pensions or government payments / allowances
- ☐ Interest earned for the relevant year from your banks, building societies etc.
- ☐ Dividend statements
- ☐ Details of rental property income
- ☐ Details of any business income
- ☐ Details of any other income earned

### HOSPITALITY WORK EXPENSES:

- ☐ Compulsory uniforms (or items with venue logo)
- ☐ Protective clothing (aprons, hair nets, gloves, footwear etc.)
- ☐ Work specific clothing (eg. tunics, scarfs, chef's jacket and hats)
- ☐ Itemised purchase costs of equipment UP TO \$300 (chef's knives, cooking utensils, bar tools etc.)
- ☐ Purchase costs of equipment costing MORE than \$300. (Processors, laptops etc.)
- ☐ Leasing, repair and maintenance costs of work related tools and equipment
- ☐ Interest on loans taken out to purchase work related equipment
- ☐ Job related self education expenses such as RSA (course fees, equipment etc.)
- ☐ Hospitality books and subscriptions
- ☐ Cash and bar shortages
- ☐ Union fees

### GENERAL WORK EXPENSES:

- ☐ Personal car expenses (Estimation of kilometres if no logbook kept, otherwise a logbook and all expense items)
- ☐ Travel expenses (flights, taxis, train and bus fares for training courses, trade fairs etc.)
- ☐ Accommodation costs while working away from home.
- ☐ Phone costs (for work usage)
- ☐ Work percentage of computer / laptop expenses (lease or purchase)
- ☐ Work percentage of internet costs
- ☐ Home office running expenses
- ☐ Work related self education expenses

### OTHER EXPENSES AND RECORDS:

- ☐ Last year's tax return fee
- ☐ Income protection insurance premiums (paid outside of Superannuation)
- ☐ Rental property expenses (eg: rates, strata fees, agent fees, interest on loan, repairs and maintenance, water rates, depreciation schedule)
- ☐ Investment expenses (For example: bank fees, financial advisors fees, investment borrowings etc.)
- ☐ Records of sales and purchases of any shares, business or property
- ☐ Private health insurance details
- ☐ Spouse details
- ☐ Children's details including D.O.B and evidence of any Centrelink benefits
- ☐ Details of any government debts (Child support, Centrelink etc.)
- ☐ Charity donations