



INDIVIDUAL INCOME TAX RETURN CHECKLIST

Please use this checklist as a guide and bring any information relevant to your situation:

Income

- ✓ Payment Summaries
- ✓ Lump Sum and Termination Payment Summaries
- ✓ Government payment statements, if received
- ✓ Interest income from banks
- ✓ Dividend statements for dividends received or reinvested
- ✓ Annual Tax Statements from Managed Funds
- ✓ Rental property
- ✓ Foreign income
- ✓ Details of shares sold to assist with Capital gains calculations
- ✓ Employee share schemes

Deductions

- ✓ Work related expenses
- ✓ Motor vehicle expenses or details of kilometres travelled
- ✓ Travel (fares and accommodation)
- ✓ Uniforms/work-wear
- ✓ Self-education and professional development
- ✓ Union, registrations, tools, subscriptions, memberships
- ✓ Home office, seminars, conferences
- ✓ Telephone, computer, internet
- ✓ Any other costs incurred earning income
- ✓ Donations to charities or building funds
- ✓ Income protection insurance

Other

- ✓ Private Health insurance annual statement
- ✓ Details of PAYG instalments paid
- ✓ Spouse details including taxable income

Tax Refunds – Did you know?

The Tax Office no longer issue refunds by cheque so you must bring your bank account details, including the BSB and Account Number with you to your appointment.