Income Tax Return Checklist for Individuals

Please use the following checklist as a guide of the information that will be needed to complete your tax return.

INCOME

- ☐ Payment Summaries
- ☐ Lump Sum and Termination Payment Summaries
- ☐ Government payment statements
- ☐ Interest income statements (from your bank)
- ☐ Dividend statements
- ☐ Annual Tax Statements from managed funds (Including capital gain statement)
- ☐ Rental property income and expense *
- ☐ Business income
- ☐ Foreign income
- ☐ Capital gains (Buy and sell contracts)
- ☐ Employee share schemes
- ☐ Partnership distribution statement
- ☐ Any other income earned throughout the year

*please contact our office for a more extensive checklist for this item

DEDUCTIONS

- ☐ Work related receipts
- ☐ Motor Vehicle
- ☐ Travel (fares and accommodation)
- ☐ Uniforms/work wear
- ☐ Self-education and professional development
- ☐ Union costs, registrations, memberships, tools, subscriptions
- ☐ Home office, seminars, conferences
- ☐ Books, stationery, journals, reference material
- ☐ Telephone, computer, internet
- ☐ Any other costs related to earning your income
- ☐ Investment costs related to earning interest, dividend and other investment income (e.g. investment advice fees)
- ☐ Donations to charities or building funds
- ☐ Income protection insurance
- ☐ Last year's tax agent fees

OFFSETS AND REFUNDS

- ☐ Health insurance statements
- ☐ Spouse details including taxable and exempt income
- ☐ Children/dependents details

OTHER INFORMATION

- ☐ Bank account details (BSB, account number and account name)
- ☐ New to MHP please bring:
  - ☐ A copy of last year's tax return
  - ☐ Your Tax File Number
- ☐ Any other information you think might be relevant

McDonnell Hume Partners Chartered Accountants
ABN 39 738 721 761

Partners
Greg McDonnell BEc FCA
Jean-Pierre Barry BCom CA

Consultant
Hamilton Hume BFA CA

Contact
50 Borilla Street, Emerald QLD 4720
Tel 07 4980 7700 Fax 07 4980 7739

Online
accountants@mhpartners.com.au
www.mhpartners.com.au