

INCOME TAX RETURN CHECKLIST – INDIVIDUALS

Please use this checklist to prepare and attach the relevant information needed for your tax return lodgment:

INCOME

- Payment Summaries/Group Certificate (if received)
- Lump Sum and Termination Payment Summaries
- Government Payment statements (if applicable)
- Interest income from banks and building societies
- Dividend statements from dividends received or reinvested
- Annual Tax Statements from Managed Funds
- Other income (if applicable):
- Rental properties income & relevant expenses
- Business/ Sole trader income
- Foreign income
- Capital gains if any made through sale of any capital assets
- Employee share schemes

DEDUCTIONS

- Work related expenses:
- Motor vehicle:
 - Business kilometers travelled or log of expenses incurred such as Petrol, oil, repairs, servicing, tyres, interest on loan, registration, insurance, car wash etc.
 - Please note that to claim the running costs associated with your vehicle, the ATO requires you to have maintained a logbook for any consecutive 12-week period during the financial year. Logbooks have a validity of five years.
- Travel (fares and accommodation)
- Uniforms/Workwear (inc. laundry & cleaning) including protective clothing, tools, boots, vests, sunglasses etc.
- Self-education and professional development
- Union, registrations, subscriptions, memberships
- Home office, seminars, conferences
- Telephone, computer, internet
- Any other costs incurred earning income.
- Donations to charities or building funds.
- Income protection and other work related insurance premiums
- Number of estimated hours worked from home
- Personal and spouse superannuation contributions (Deductible when paid)

OFFSETS & REFUNDS

- Spouse details including taxable and exempt income.

TAX REFUNDS

Please provide the following nominated bank account details to receive your refund:

- Financial Institution name
- Account Name
- BSB
- Account Number