

Income Tax Return Checklist – Individuals

INCOME

- Payment Summaries
- Lump Sum & Termination Payment Summaries
- Government payments (Newstart, Age Pension, etc)
- Interest earned on bank accounts
- Dividend statements
- Annual tax statement from Managed funds
- Other Income:
 - Employee share scheme
 - Capital gains
 - Foreign income
 - Rental Property (Rental Property Questionnaire)
 - Business

DEDUCTIONS

- Work related expenses:
 - Motor vehicle (Log Book/Cents per KM Questionnaire)
 - Domestic and Overseas Travel Questionnaire
 - Clothing, Uniforms and Laundry Questionnaire
 - Self-education Questionnaire
 - Union fees/Registrations/Subscriptions/Memberships Questionnaire
 - Tools and Equipment Questionnaire
 - Telephone and Internet Questionnaire
 - Home office Questionnaire
 - Overtime Meal Allowance Expense Declaration
 - Any other work-related expenses
- Gifts and Donations Questionnaire
- Tax agent fees
- Income protection insurance
- Interest/Expenses related to investment activities

OTHER INFORMATION

- Private health insurance statement
- Spouse details including taxable and exempt income

*"Liability limited by a scheme approved under Professional Standards Legislation."**

*Other than for the acts or omissions of financial services licensees.

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