

Individual Income Tax Return Checklist

Did you receive?	Y/N	If Yes, this information is required to prepare your return
Salary/Wages/ Allowances/Pensions		Payment Summaries for all employers, government agencies, Superannuation payers, Annuity payers or Overseas pensions received.
Lumpsum/Termination Payments		Payment Summaries and ETP Statements
Interest		For each account: bank/building society name, account number, amount earned and any Income Tax amounts withheld.
Dividends received & Employee Share Schemes		For each share: company name, franked and unfranked amounts, and imputation credits. (Or provide dividend notices). Did you incur any costs to earn this income, such as investment loan interest?
Business Income		Details of all receipts & all related expenses and copies of all BAS forms lodged and associated calculations.
Investment Income, Partnership or Trust Income		Investment Fund name and a copy of Annual Tax Advice (as provided by the Fund Manager at year-end). Copy of Trust/Partnership distribution statement from whom the Income was received.
Income from sale of assets		Purchase and sale dates and any associated costs for the sale of assets such as real estate, shares or other Capital Assets during the Income year
Rental Income		Property address, gross rent received, details of all expenses relating to each rental property owned including Bank Loan interest.
Foreign source Income		Details of Income earned, source of Income and any Australian Tax Credits applicable to the Income
Spouse Income for the current year		Details of Spouse Taxable Income for the same Income year that your Tax Return is being completed for.

Did you spend money on?	Y/N	If Yes, this information is required to prepare your return
Car Expenses		Make, model and registration number of the car used, Log Book where this method is used, details of expenses, and or distance traveled. How car used was purchased i.e. cash/hire purchase/lease/novated lease.
Other Work Travel		For each trip provide details of travel destinations, purpose of trip, costs of travel & accommodation. If travel is for 6 or more continuous nights, do you have a travel diary or itinerary?
Uniform & Protective Clothing		Provide receipts for all items purchased or repaired during the year.
Uniform Cleaning Expenses		For professional dry cleaning & laundering, provide receipts. For home laundry, provide estimate number of work wash loads per year.
Self Education		Courses of study undertaken and details of all associated expenses..
Sun Protection Items		If you are an outdoors worker you are entitled to claim for sun protection items such as sunscreen, sunglasses, hats etc.
All Other Work- Related Expenses		Details of all expenses incurred in relation to your occupation including details of any capital equipment that you use for your work.
Gifts/Donations		Details of charitable organizations and the amount of each donation.
Income Protection Insurance		Details of Policy type and premiums paid during the year.
Private Health Insurance Policy		Name of health fund, membership number and type of cover (ie hospital/ancillary/combined). Please provide annual tax statement received from Health fund.
Net Medical Expenses over \$2000		Details of all medical expenses and any refunds or reimbursements received from Health Funds.