

Income Tax Return Checklist Individuals

Please use this checklist and bring any relevant information with you as we cannot be sure when the Australian Tax Office Portal will have these details available.

INCOME

Payment Summaries

- Lump Sum and Termination Payment Summaries
- Government payment statements, if received
- Interest income from banks and building societies
- Dividend statements for dividends received or reinvested
- Annual Tax Statements from Managed Funds
- Other income:
 - Rental properties
 - Business
 - Foreign income
 - Capital gains
 - Employee share schemes

DEDUCTIONS

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

OFFSETS AND REFUNDS

- Health insurance and rebate entitlement statement
- IAS statements or details of PAYG instalments paid
- Spouse details including taxable and exempt income
Zone offset (location and how many days)

BANK DETAILS - for the fastest way to receive your refund please bring your bank account details, including the BSB and Account Number with you to your appointment.

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