

Individual Tax Return Checklist

Name of taxpayer: _____

Address: _____

Preferred Contact No: _____

Information Required	Information Provided	Not Applicable
Income		
PAYG summaries from employers, Centrelink and/or superannuation funds	<input type="checkbox"/>	<input type="checkbox"/>
Lump sum payments (e.g. Employment Termination Payment)	<input type="checkbox"/>	<input type="checkbox"/>
Any non cash benefits	<input type="checkbox"/>	<input type="checkbox"/>
Trust distribution statement, including copy of the trust's tax return	<input type="checkbox"/>	<input type="checkbox"/>
Managed fund annual tax statement and capital gains tax statement	<input type="checkbox"/>	<input type="checkbox"/>
Partnership distribution statement, including a copy of the partnership's tax return	<input type="checkbox"/>	<input type="checkbox"/>
Dividend statements	<input type="checkbox"/>	<input type="checkbox"/>
Bank statements detailing interest earned	<input type="checkbox"/>	<input type="checkbox"/>
Term deposit statements detailing interest earned	<input type="checkbox"/>	<input type="checkbox"/>
Employee Share Scheme information detailing grants & tax status	<input type="checkbox"/>	<input type="checkbox"/>
Buy/sell contract notes for shares or managed funds (if any were sold)	<input type="checkbox"/>	<input type="checkbox"/>
Work-related Deductions		
Details of depreciable assets bought during the year (e.g. laptops) & work related use %	<input type="checkbox"/>	<input type="checkbox"/>
Mobile phone work related use %	<input type="checkbox"/>	<input type="checkbox"/>
Home office hours per week (average)	<input type="checkbox"/>	<input type="checkbox"/>
Home internet work related use %	<input type="checkbox"/>	<input type="checkbox"/>
Professional journals/magazines	<input type="checkbox"/>	<input type="checkbox"/>
Professional memberships/subscriptions	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for continuing professional development courses and seminars	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for self-education expenses	<input type="checkbox"/>	<input type="checkbox"/>
Receipts or evidence of work-related deductions such as protective clothing, uniform expenses and travel	<input type="checkbox"/>	<input type="checkbox"/>
Vehicle log book for motor vehicle expenses (if using the log book method)	<input type="checkbox"/>	<input type="checkbox"/>
Vehicle expenses (fuel, repairs & maintenance, registration, insurance)	<input type="checkbox"/>	<input type="checkbox"/>
Other Deductions		
Receipts for donations \$2 and over to registered charities (tin collection)	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in managing tax affairs (e.g. tax agent's fees)	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in earning investment income	<input type="checkbox"/>	<input type="checkbox"/>
Income protection insurance premiums	<input type="checkbox"/>	<input type="checkbox"/>
Rental Properties		
Annual statement from property agent (if engaging the services of an agent)	<input type="checkbox"/>	<input type="checkbox"/>
Records detailing rental income (if not engaging the services of an agent)	<input type="checkbox"/>	<input type="checkbox"/>
Date of when property was purchased	<input type="checkbox"/>	<input type="checkbox"/>
Details of depreciable assets bought or disposed during the year	<input type="checkbox"/>	<input type="checkbox"/>
Expenses (which are not detailed on the property agent annual statement) incurred, such as water charges, land tax and insurance premiums	<input type="checkbox"/>	<input type="checkbox"/>
If property is held by more than one individual, details of owners and their legal ownership percentage	<input type="checkbox"/>	<input type="checkbox"/>
If property was disposed of during the income year, information relating to dates and costs associated with the acquisition and disposal of the property	<input type="checkbox"/>	<input type="checkbox"/>
Loan statements for property showing interest paid for the income year	<input type="checkbox"/>	<input type="checkbox"/>
Period that property was rented out during the income year and if not available for a period of time, the reason (eg. used for personal use, renovations, etc)	<input type="checkbox"/>	<input type="checkbox"/>
Depreciation reports including quantity surveyor reports	<input type="checkbox"/>	<input type="checkbox"/>

Information Required	Information Provided	Not Applicable
Offsets / Rebates Details of any superannuation contributions for spouse Details of dependants, including their age, occupation and income Details of medical expenses (disability aids, attendant care or aged care only) where the total exceeds \$2,299 (after Medicare and private health fund rebates) Private health insurance statement	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
If Operating as a Sole Trader Cashbook, which includes records of drawings taken before the business takings are banked Copy of MYOB data file or equivalent & details of the version and password Copies of Business Activity Statements lodged Copies of PAYG summaries for employees Details of any government grants, rebates or payments received Details of superannuation contributions for employees Payments of salaries and superannuation to associates Records from accounting software (e.g. trial balance, P&L and balance sheet) Statements of all liabilities of the business Superannuation contributions for self-employed persons (Notice of Intent)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Other Information Copies of Instalment Activity Statements lodged If you have any doubt about any income or expenses you have received or incurred, send the documents in with your other information Any other information that you think is relevant	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>