
INDIVIDUAL INCOME TAX RETURN CHECKLIST

INCOME

- PAYG Summary Statements
- Australian Government Allowances (i.e. Newstart, Youth Allowance etc.)
- Other Income (Director Fees, allowances, bonuses, tips, consulting fees etc.)
- Bank Statements
- Trust or Partnership Distribution Statement
- Share Dividend Statements
- Managed Funds Statements
- Statements of any Capital Assets sold (i.e. shares, properties etc.)
- Lump Sum Payment Statements (i.e. Eligible Termination Statements)
- Summary of business income & expenses (i.e. cashbooks, excel spreadsheets, MYOB files)
- Foreign Source Income

RENTAL INCOME

- Any rental income received – please ask us for the full rental checklist for further details
- Annual Agents Statements (if applicable)
- Invoices for any amounts paid personally (i.e. council rates, water rates, insurance etc.)

DEDUCTIONS

- Receipts for Donations to charities
- Receipts for Work Related Car Expenses
- Receipts for Work Related Travel Expenses
- Receipts for Work Related Self Education Expenses (i.e. fees, books, computer costs, travel etc.)
- Receipts for Work Related Expenses (i.e. home office expenses, laundry, memberships, overtime meals, seminars, subscriptions, telephone, tools & equipment, union fees)
- Depreciable Items (i.e. Purchase of assets work > \$300 for work, any assets sold)
- Bank Statements for funds borrowed to purchase investments
- Receipts for Income Protection Insurance
- Personal Superannuation Contributions

OTHER INFORMATION

- Private Health Insurance Statement

