

INDIVIDUAL TAX RETURN CHECKLIST

INCOME DETAILS

- PAYG summaries
- Interest earned for the relevant year from banks, building societies etc
- Share dividend statements
- Centrelink, pension, or government payments/allowances
- Trust/Partnership distribution statements
- Details of rental property income (see rental checklist)
- Foreign sourced income
- Payments from superannuation or income stream
- Details of any other income earned

PERSONAL DETAILS

- Spouse details (income, DOB etc)
- Dependants – name, DOB, and legal responsibilities
- Private health insurance statement

EXPENSES

- Motor vehicle expenses (Inc. estimation of Kilometres if no log book kept, otherwise logbook & all expense items)
- Work travel expenses (did you receive a travel allowance)
- Laundry (did you wear a compulsory uniform or protective clothing)
- Memberships (did you pay subscription fee to a private body or union)
- Receipts of gifts/donations to charity
- Accounting fees (did you pay a tax agent to prepare a tax return last year)
- Income protection premiums
- Receipts or evidence of work related deductions eg: tools, car, home office, travel, laundry
- Receipts for self-education expenses eg: fees, books, computer costs

GENERAL

- Details of any government debts (child support, Centrelink etc.)
- Records of sale & purchase of any shares, business, or property

NOTES:
