

## Income Tax Return Checklist – Individuals

Please use this checklist and supply 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
  - 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

### Tax Refunds

The Australian Taxation Office no longer issue refunds by cheque. Therefore you will need to supply your bank account details; Account Name, BSB and Account Number.