

Individual Tax Return Checklist

*Please collect your receipts, tax invoices and documents for the items below.
Check them off when you've found them – this will make your tax return appointment faster and easier.*

GENERAL

- Last Year's Income Tax Return
- Records of sales and purchases of any shares, business or property
- Private Health Insurance Details
- Spouse Details
- Bank account details for direct tax refunds

INCOME

- PAYG Summaries
- Pensions or Government Payments/Allowances
- Interest earned for the relevant year from the banks, building societies etc.
- Dividend Statements
- Details of rental property income
- Details of any business income
- Details of any other income earned

EXPENSES

- Work Related Expenses *For example: uniform, tools, education, fees etc.*
- Motor Vehicle Expenses *Incl. estimation of Kilometres if no logbook kept, otherwise logbook and all expense items*
- Travel Expenses
- Investment Expenses *For example: bank fees, financial advisors fees, investment borrowings etc.*
- Rental Property Expenses *For example: rates, body corp fees, agent fees, interest on loan, repairs and maintenance (inside and out), travel, water rates, depreciation schedule, etc.)*
- Cost of managing tax affairs
- Charitable donations