

## Annual Tax Return Checklist Individual

When you attend your interview or drop in your records you must provide all the following information that is applicable to you.

### Income

- PAYG Payment Summaries (employer)
  - Employment Termination Income
- Bank or Financial Institution Interest
  - Institution name & account number
  - Joint/ Sole name
  - Tax Withheld
- Dividends received
  - Dividend Statement
  - Were shares received under an employee acquisition scheme?
- Directors Fees
  - Company Name
  - Amount
- Superannuation Income
  - Lump Sum
  - Pension
- Partnership/Trust income
  - Entity Name
  - Amount
- Foreign Income
  - Tax Withheld
  - Name
  - Amount
- Commonwealth Government Payments
  - Newstart
  - Youth Allowance
  - AuStudy/Abstudy
- Government Pension Payments
  - Aged Pension
  - Disability Pension
  - Carer Payment
- PAYG Instalments
  - Copies of Instalment Activity Statements

### Rebates

- Spouse
  - Name & Date of Birth
  - Taxable Income
- Children (especially Newborns)
  - Name & Date of Birth
- Zone Allowance (if Applicable)
  - Postcode
  - Nearest Post Office
- Private Health
  - Statement of Private Health
- Superannuation Contributions of behalf of Spouse
  - Relevant Documents
- HELP/ HECS

### Expenses/ Deductions

- Work Related
  - Motor Vehicle
  - Travel
  - Uniform, Industry Specific or Protective Clothing and Laundry
  - Self Education
    - Seminars & Courses
    - Additional External Education relating or furthering current job
  - Home office expenses
    - Computer & Software
  - Telephone/Mobile/ Internet
  - Tools & Equipment
    - Journals Periodicals
    - Sun Protection (If Applicable)
    - Replacements/ Repairs
  - Subscriptions/ Union Dues
- Income Protection
- Donations over \$2
- Tax Agent fees

### Rental Properties

- Rental Income
- Rental expenses
  - Bank Interest
  - Repairs & Maintenance
  - Council Rates
  - Insurances
  - Property Management Fees
- Capital Expenses on Property
- Depreciation (if applicable)

### Capital Gains

- Did you sell Shares?
  - Sold
    - Quantity Sold,
    - Amount Received
    - Date Sold
  - Purchased
    - Quantity Purchased
    - Price per Share
    - Date of Purchase
- Did you buy or sell Investment property?
  - Settlement Statement
  - Purchase and/or Sell Price

If you would like to clarify any of the above information please contact our office prior to making your appointment