

Individual Tax Return Checklist

- ❑ PAYG payment summaries (group certificates) from all sources (employers, Centrelink, or superannuation funds)
- ❑ Interest income details
- ❑ Dividend income slips
- ❑ Rental property income and expenses (including annual rental statement from property agent)
- ❑ Details of any assets sold during the year, such as property or shares (and their original purchase cost)
- ❑ Motor vehicle expenses and logbook
- ❑ Receipts for work related travel (including flights, accommodation, taxis, parking)
- ❑ Receipts for work related expenses (eg. stationery, computer costs, phone, mobile phone, union fees, professional body subscriptions)
- ❑ Depreciation schedule from previous year for equipment/assets used for work
- ❑ Receipts for self-education expenses that relate to your work (eg. course fees, books)
- ❑ Receipts for donations
- ❑ Receipts for last years tax agent fees
- ❑ Private health insurance statement
- ❑ Details of Medical Expenses (less Medicare/Private Health rebates) if the net total is over \$1,500
- ❑ HECS/HELP debt statement
- ❑ Details of any other income or expenses (that may be related to earning any of your income), including foreign income
- ❑ Details of business income and expenses (including depreciation schedules from previous year for plant, equipment or other business assets)
- ❑ Copy of last year’s tax return if available
- ❑ Spouse’s taxable income
- ❑ Details of any dependants (name and date of birth)