



Income Tax Return Checklist: Individual

Name:..... Date of Birth:.....

Address:.....

Email:..... Mobile:.....

Occupation:.....

Bank:..... Acct Name:.....

BSB:..... Acct Number:.....

TFN:.....

INCOME

- Lump Sum & Termination Payment Summaries
- Government Payment Statements
- Interest Income
- Dividend Statements
- Annual Tax Statements from Managed Funds

Other Income:

- Rental Properties (*Annual Income & Expenditure Statement*)
- Business
- Foreign Income
- Capital Gains (Sale of Assets Including Shares, Property, Crypto Currency)
- Employee Share Schemes

DEDUCTIONS

Work Related Expenses:

- Motor Vehicle
- Travel
- Uniforms / Work-wear
- Self-education & Professional Development
- Union, Registrations, Tools, Subscriptions, Memberships
- Home Office
- Telephone, Computer, Internet
- Donations
- Income Protection Insurance
- Prior Year Accountant Fee

Investment Property Related Expenses:

- Loan Statements if Applicable
- Invoices for Property Expenses such as Water, Strata, Repairs, Council Rates (if not paid by agent)
- Tax Depreciation Schedule

OFFSETS & REFUNDS

Investment Property Related Expenses:

- Health Insurance
- Spouse Details inc. Taxable & Exempt Income