

Individual Tax Return Checklist – Basic

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

- ☐ Records of sales and purchases of any shares, business or property
- ☐ Last year's income tax return
- ☐ Private Health Insurance details
- ☐ Spouse details
- ☐ Children's details including D.O.B and evidence of any Centrelink benefits

INCOME

- ☐ PAYG Summaries
- ☐ Pensions or Government payments/Allowances
- ☐ Interest earned for the relevant year from the banks, building societies, etc.
- ☐ Dividend statements
- ☐ Rental property income
- ☐ Business income
- ☐ Other income earned

EXPENSES

- ☐ Worked related expenses, e.g. uniform, tools, education, fees, etc.
- ☐ Motor vehicle expenses, e.g. estimation of kilometres if no logbook kept, logbook and all expense items
- ☐ Travel expenses
- ☐ Investment expenses, e.g. bank fees, financial advisor fees, investment borrowings, etc.
- ☐ Rental property expenses, e.g. 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