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Individual Income Tax Return Checklist

If you're not sure what to bring to your meeting with us, we've prepared a little checklist to help you out. We can access some income data through the ATO portal, but there is absolutely no guarantee this information will be available to us for our meeting – it would be best if you could bring as much information along as possible!

Personal Details - *New clients only*

- ☐ Tax File Number (TFN)
- ☐ Bank details (BSB & account number)
- ☐ Prior year tax return (if possible)

Income

- ☐ Payment summaries:
  - ☐ Employer
  - ☐ Centrelink
  - ☐ Superannuation fund
  - ☐ Department of Veterans Affairs
- ☐ Interest received from banks and financial institutions
- ☐ Lump sum & termination payment summaries
- ☐ Dividend statements – received or reinvested
- ☐ Trust distributions
- ☐ Rental income
- ☐ Foreign income
- ☐ Capital gains from sale of investments
- ☐ Employee share schemes
- ☐ Annual tax statements from managed funds

Deductions

- ☐ Work-related expenses:
  - ☐ Motor vehicle (logbook, receipts)
  - ☐ Travel expenses
  - ☐ Protective clothing/work uniforms & laundry
  - ☐ Work-related self-education
  - ☐ Union fees, registrations, subscriptions, memberships
  - ☐ Telephone, computer, internet
  - ☐ Other work-related expenses
- ☐ Charitable donations
- ☐ Tax agent fees (from prior year)
- ☐ Investment expenses:
  - ☐ Bank fees
  - ☐ Financial advisor fees
  - ☐ Interest on investment borrowings
  - ☐ Dividend deductions
- ☐ Rental property expenses:
  - ☐ Interest
  - ☐ Rates
  - ☐ Body corporate fees
  - ☐ Agent fees
  - ☐ Repairs & maintenance
  - ☐ Depreciation schedule
  - ☐ Insurance

Offsets

- ☐ Spouse taxable & exempt income
- ☐ PAYG instalments paid
- ☐ Health insurance & rebate entitlement statement

Our fee is fully tax deductible in the next financial year

NOTE: This guide applies to individuals with straight-forward tax affairs. It is not fully exhaustive, but should cover the vast majority of returns. If you have any questions, please don't hesitate to contact us.