



david unwin
accountant
tax agent

Street: Shop 2, 174 Morayfield Rd, Morayfield

Postal: PO Box 886, Morayfield QLD 4506

Phone: 5495 1347 | **Email:** info@davidunwin.com.au

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

- | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------|
| <input type="checkbox"/> Payment summaries: <ul style="list-style-type: none"><input type="checkbox"/> Employer<input type="checkbox"/> Centrelink<input type="checkbox"/> Superannuation fund<input type="checkbox"/> Department of Veterans Affairs | <input type="checkbox"/> Dividend statements – received or reinvested |
| <input type="checkbox"/> Interest received from banks and financial institutions | <input type="checkbox"/> Trust distributions |
| <input type="checkbox"/> Lump sum & termination payment summaries | <input type="checkbox"/> Rental income |
| | <input type="checkbox"/> Foreign income |
| | <input type="checkbox"/> Capital gains from sale of investments |
| | <input type="checkbox"/> Employee share schemes |
| | <input type="checkbox"/> Annual tax statements from managed funds |

Deductions

- | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Work-related expenses: <ul style="list-style-type: none"><input type="checkbox"/> Motor vehicle (logbook, receipts)<input type="checkbox"/> Travel expenses<input type="checkbox"/> Protective clothing/work uniforms & laundry<input type="checkbox"/> Work-related self-education<input type="checkbox"/> Union fees, registrations, subscriptions, memberships<input type="checkbox"/> Telephone, computer, internet<input type="checkbox"/> Other work-related expenses | <input type="checkbox"/> Investment expenses: <ul style="list-style-type: none"><input type="checkbox"/> Bank fees<input type="checkbox"/> Financial advisor fees<input type="checkbox"/> Interest on investment borrowings<input type="checkbox"/> Dividend deductions |
| <input type="checkbox"/> Charitable donations | <input type="checkbox"/> Rental property expenses: <ul style="list-style-type: none"><input type="checkbox"/> Interest<input type="checkbox"/> Rates<input type="checkbox"/> Body corporate fees<input type="checkbox"/> Agent fees<input type="checkbox"/> Repairs & maintenance<input type="checkbox"/> Depreciation schedule<input type="checkbox"/> Insurance |
| <input type="checkbox"/> Tax agent fees (from prior year) | |

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.