

Individual Tax Return Checklist – Year End

Name of taxpayer: _____

Address: _____

Email: _____ Telephone: _____

Information	Information Provided	Not Applicable
Income		
PAYG payment summaries (group certificates)	<input type="checkbox"/>	<input type="checkbox"/>
Lump sum payments & ETPs	<input type="checkbox"/>	<input type="checkbox"/>
Partnership & trust distribution statements	<input type="checkbox"/>	<input type="checkbox"/>
Foreign source income details	<input type="checkbox"/>	<input type="checkbox"/>
Bank statements & term deposits stating interest earned	<input type="checkbox"/>	<input type="checkbox"/>
Dividend statements	<input type="checkbox"/>	<input type="checkbox"/>
Employee share scheme statements	<input type="checkbox"/>	<input type="checkbox"/>
Managed fund annual tax statement including capital gains	<input type="checkbox"/>	<input type="checkbox"/>
Capital gains (buy/sell contracts for shares & property sold)	<input type="checkbox"/>	<input type="checkbox"/>
Work-related Deductions		
Motor vehicle deductions (logbook or cents per kilometre)	<input type="checkbox"/>	<input type="checkbox"/>
Details of home office expenses	<input type="checkbox"/>	<input type="checkbox"/>
Professional memberships/subscriptions/union fees	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for courses, seminars & training	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for self-education expenses	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for other work-related deductions such as protective clothing, uniforms, tools and equipment	<input type="checkbox"/>	<input type="checkbox"/>
Other Deductions		
Donations of \$2 and over to registered charities	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in managing tax affairs (tax agent's fees)	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in earning interest, dividend and other investment income (investment loans & fees)	<input type="checkbox"/>	<input type="checkbox"/>
Income protection insurance premiums	<input type="checkbox"/>	<input type="checkbox"/>

Information	Information Provided	Not Applicable
Rental Properties Period property was rented out during the income year Rental property statement (if managed by property agent) Rental income & expenditure (if not managed by property agent) Out of pocket expenses such as water, land tax and insurance Details of assets bought or disposed of during financial year Details of any capital improvements made on property Disposal of property during the financial year (buy/sell contracts & settlement statements)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Offsets/Rebates Details of any superannuation contributions for spouse Zone rebate (only claimable for zone residents) Details of dependants (date of birth and income) Private health insurance statement	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Business Income (Sole Trader only) Business income & expenditure details (cashbook, MYOB etc) Copies of PAYG summaries for employees Details of any government grants, rebates or payments received Details of superannuation contributions for employees Details of any business assets purchased during financial year Business bank & loan statements Notice of superannuation contributions for self-employed persons	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Other Information Bank account details Spouse income Child support documents Any other information that you think is relevant	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>