Individual
Tax Return Checklist

When you come to see us at tax time, please bring with you the following information to assist us to complete your return.

Income

- ☐ PAYG Payment Summaries
- ☐ Lump Sum payments (eg: Eligible Termination Payment Redundancy statement)
- ☐ Government payments, pensions, allowance documents/statements. This includes parenting payments and Dad & Partner Pay from Centrelink
- ☐ Pensions/annuities taxable amount
- ☐ Bank statements summary (interest received)
- ☐ Share dividend statements
- ☐ Managed Fund Investments income statements
- ☐ Contract notes for buy/sell share transactions
- ☐ Foreign Source Income (including pensions, investments, employment and property)
- ☐ Trust/ partnership distribution statement

Work related deductions

- ☐ Travel (not reimbursed)
- ☐ Car expenses
- ☐ Diary log of work related km's
- ☐ Uniform and protective clothing purchases
- ☐ Overtime meal
- ☐ Journal, subscriptions and periodicals
- ☐ Sun protection products
- ☐ Seminars and courses
- ☐ Mobile phone – highlighted work related
- ☐ Union fees
- ☐ Tools and equipment
- ☐ Copy of log book
- ☐ 4 week log of home office use
- ☐ 4 week log of internet use

Offsets

- ☐ Private health insurance statement
- ☐ Spouse details (income and DOB)

Rental Property

- ☐ Date rental property was purchased (provide copy of settlement statement)
- ☐ Details of periods property was rented
- ☐ Rental statements or total rent received
- ☐ Capital costs / Depreciation schedule
- ☐ Advertising
- ☐ Agent fees
- ☐ Body corporate
- ☐ Cleaning
- ☐ Council rates and land tax
- ☐ Gardening / lawn mowing
- ☐ Insurance
- ☐ Interest on loans and borrowing expenses
- ☐ Legal fees
- ☐ General maintenance
- ☐ Pest control
- ☐ Water charges
- ☐ Bank fees
- ☐ Sundry rental expenses
- ☐ Loss of income insurance payments

Investment related deductions

- ☐ Interest/fees on borrowing for investment purposes (provide statement)
- ☐ Sale Statement / Contract of assets sold i.e. rental property

Other deductions

- ☐ Receipts of gifts / donations
- ☐ Receipts for self-education expenses (eg: books, computer costs, travel expenses, course fees)
- ☐ Income Protection Insurance Premiums
- ☐ Fees for financial planning advice
- ☐ Notice of Intent to Claim Superannuation

Other useful information

- ☐ Previous year's accountant fees
- ☐ Last year's tax return (new client)
- ☐ Prior year tax losses (new client)
- ☐ Prior year capital losses (new client)

APPOINTMENT

Office: ____________Date:______________
Day: ____________Time:_____________

Call us today on 8389 3385

MAKING CENTS TAXATION SERVICES