

# Income Tax Return Checklist – Individuals

Please use this checklist and bring any relevant information with you as we cannot be sure when the Australian Tax Office Portal will have these details available.

## INCOME

- Payment Summaries
- Lump Sum and Termination Payment Summaries
- Government payment statements, if received
- Interest income from banks and building societies
- Dividend statements for dividends received or reinvested
- Annual Tax Statements from Managed Funds
- Other income:
  - Rental properties
  - Business
  - Foreign income
  - Capital gains
  - Employee share schemes

## DEDUCTIONS

- Work related expenses:
  - Motor vehicle
  - Travel (fares and accommodation)
  - Uniforms/work-wear
  - Self-education and professional development
  - Union, registrations, tools, subscriptions, memberships
  - Home office, seminars, conferences
  - Telephone, computer, internet
  - Any other costs incurred earning income
- Donations to charities or building funds
- Income protection insurance

## OFFSETS AND REFUNDS

- Health insurance and rebate entitlement statement
- IAS statements or details of PAYG instalments paid
- Spouse details including taxable and exempt income

**TAX REFUNDS** – the Tax Office no longer issues refunds by cheque so you must bring your bank account details, including the BSB and Account Number with you to your appointment.

### APPOINTMENT

Office: \_\_\_\_\_ Date: \_\_\_\_\_

Day: \_\_\_\_\_ Time: \_\_\_\_\_

**Call today on 13 23 25**

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