

2019 Income Tax Return Checklist - Individuals

Client Name: _	Email	·
Phone no:		

INCOME

	Category	Y/N	Document	Notes
1	Salary or wages		PAYG payment summaries / Single Touch Payroll reported by employer to myGov	
2	Allowances, earnings, tips, director's fees		Bank records, other corro	
3	Employment termination payments		ETP statements	
4	Pensions, annuities, Centrelink payments		PAYG group certificates, tax statements	
5	Superannuation lumpsums		Stmt from Payee	
6	Interest received		Bank statements showing any tax withheld if applicable	
7	Dividends received		Dividend notices	
8	Trust/partnership distributions		Tax statements	
9	Employee share schemes		Employee share scheme statement	
10	Rental income		Details of income and expenditure	
11	Business income		Details of income and expenditure	
12	Capital gain – did you make a capital gain or loss this year?			
13	Other income		Details	
14	Foreign income		Details	

DEDUCTIONS

	Category	Y/N	Document	Notes
1	Work related car		Mileage only applicable if using for vehicle for work purposes (not home to work	
1.1	Did you maintain a logbook for		and back) Details	
1.1	12 consecutive weeks?		Details	
	Work related travel		Travel related to employment 2 (flights etc)	
2.1	Did you maintain a travel diary?		Details	
3	Uniform and laundry		Provide details (uniform is limited to occupation specific clothing eg. Nurses uniform. Normal attire does not qualify.	
4	Self-education		Details of course studied, education provider and costs incurred	
5	Other work related		Licenses, union dues, subscriptions, computer expenses, mobile, internet and stationery.	
6	Interest expenses		Interest on investment loans	
7	Gifts and donations		Donation receipts	
8	Cost of managing tax affairs		Invoice from tax agent Interest paid to ATO	
9	Personal superannuation contributions		Date paid and fund name	
10	Other deductions		Income protection premiums	

11	Tax losses from prior years	Details	

OTHER DETAILS

	Category	Y/N	Document	Notes
1	Spouse		Details – name, date of birth, tax file number, taxable income	
2	Dependent children		Number and ages	
3	Private health insurance		Details of policy	
4	Medical expenses rebate		Phased out – can no longer claim	
5	Zone – did you live and work in remote zone?		Location and dates	
6	Did you become a tax resident during the year?			
7	Did you cease to be a tax resident during the year?			
8	Did you have a Medicare exemption?		Details	
9	Do you have a HELP or SFSS student loan?		Details	
10	PAYG income tax instalments		Details of PAYG payments made during the year	

Please add any other information which you think may be relevant to your current year tax situation: