

2020 Income Tax Return Checklist - Individuals

Client Name: _	Email: _	
Phone no:		

INCOME

	Category	Y/N	Document	Notes
1	Salary or wages		Single Touch	
			Payroll reported	
			by employer to	
			myGov	
2	Allowances, earnings, tips,		Bank records,	
	director's fees		other corro	
3	Employment termination payments		ETP statements	
4	Pensions, annuities, Centrelink		PAYG group	
	payments incl JobSeeker		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 and back)	
1.1	Did you maintain a logbook for 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	Working from Home Pre – Covid Post - Covid		Hours working from home and expenses incurred for equipment for home office.	
7	Interest expenses		Interest on investment loans	
8	Gifts and donations		Donation receipts	
9	Cost of managing tax affairs		Invoice from tax agent Interest paid to ATO	

10	Personal superannuation contributions	Date paid and fund name
	CONTINUUTIONS	Turiu Harrie
11	Other deductions	Income
		protection
		premiums

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		Location and	
	remote zone?		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: