



## 2023 Income Tax Return Checklist - Individuals

Client Name: \_\_\_\_\_ Email: \_\_\_\_\_

Phone no: \_\_\_\_\_

### INCOME

	Category	Y/N	Document	Notes
1	Salary or wages		Single Touch Payroll reported to myGov and Tax Agent Portal	
2	Allowances, earnings, tips, director's fees		Bank records, other corro	
3	Employment termination payments		ETP statements	
4	Pensions, annuities, Centrelink payments incl JobSeeker		PAYG group certificates, tax statements	
5	Superannuation lumpsums		Stmnt from Payee	
6	Interest received		Bank statements showing interest and taxes withheld	
7	Dividends received		Dividend notices	
8	Trust/partnership distributions		Tax stmt	
9	Employee share schemes		Employee share scheme stmt	
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 own vehicle for work purposes (not home to work and back)	
1.1	Did you maintain a logbook for 12 consecutive weeks?		Details	
2	Work related travel		Travel related to employment (flights, accom, uber etc)	
2.1	Did you maintain a travel diary?		Details	
3	Uniform and laundry		Provide details (uniform is limited to occupation specific clothing or company logo'd clothing. 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		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		Notice of intent to claim must be acknowledged by superfund	
11	Other deductions		Income protection premium stmt	

## 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:


