



## Income Tax Return Checklist - Individuals

Client Name: \_\_\_\_\_ Email: \_\_\_\_\_ Phone no: \_\_\_\_\_

### INCOME

	<b>Category</b>	<b>Y/N</b>	<b>Document</b>	<b>Notes</b>
1	Salary or wages		PAYG group certificates	
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	Interest received		Bank statements	
6	Dividends received		Dividend notices	
7	Trust/partnership distributions		Tax statements	
8	Employee share schemes		Employee share scheme statement	
9	Rental income		Details of income and expenditure	
10	Business income		Details of income and expenditure	
11	Capital gain – did you make a capital gain or loss this year?			
12	Other income		Details	
13	Foreign income		Details	

### DEDUCTIONS

	<b>Category</b>	<b>Y/N</b>	<b>Document</b>	<b>Notes</b>
1	Work related car		Vehicle details, logbook details	
2	Work related travel		Travel related to employment	
3	Uniform and laundry		Provide details	
4	Self-education		Provide details of course studied, education provider and costs incurred	
5	Other work related		Subscriptions, computer expenses, mobile phone, internet and stationery costs	



	<b>Category</b>	<b>Y/N</b>	<b>Document</b>	<b>Notes</b>
6	Interest expenses		Interest on investment loans	
7	Gifts and donations		Donation receipts	
8	Cost of managing tax affairs		Invoice from tax agent	
9	Personal superannuation contributions		Date paid and fund name	
10	Other deductions		Income protection premiums	
11	Tax losses from prior years		Details	

OTHER DETAILS

	<b>Category</b>	<b>Y/N</b>	<b>Document</b>	<b>Notes</b>
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		If out-of-pocket costs exceed \$2,000	
5	Zone – did you 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:
