

## Income Tax Return Checklist – Individuals

Please use this checklist and bring relevant information to appointment as Australian Tax Office Portal may not have these details available.

### PHOTO ID

### INCOME

- PAYG Payment Summaries
- Lump Sum and Employment Termination Payment Summaries
- Govt. payment statements (If payment received, such as from Centrelink)
- Statement of bank interest earned on fixed deposits or online saver accounts.
- Dividend statements including ones for dividends reinvested.
- Statements from Managed Funds
- Other income including following –
  - Business Income
  - Rental property income
  - Foreign Income
  - Capital Gains
  - Employee Share Scheme statement

### DEDUCTIONS

- Motor Vehicle Expenses – such as log book or details of kilometres travelled.
  - Work related travel expenses
  - Work related uniform.
  - Work related self-education.
  - Union fees, memberships, home office, Subscriptions
  - Mobile phone, Computer, laptop, Internet.
  - Seminars and conferences
  - Income protection insurance
  - Donations to Charities.
  - Fees paid to accountant for last years' tax return
- OFFSETS AND REFUND
- Health insurance statement.
  - Details of spouse along with their income
  - PAYG instalments paid
- HECS-HELP Debt Statement

**TAX REFUND** - ATO no longer issues refund by cheque, please bring your bank account details including BSB and Account Number to your appointment.

### APPOINTMENT

Date \_\_\_\_\_

Time \_\_\_\_\_