



## Individual Tax Return Checklist

### Income

- Group certificates & payment summaries
- Lump sum payments, eg Eligible Termination
- Centrelink, social security, pensions, allowance, statements
- Investment information
- Trust distribution statements
- Managed Fund investment annual statement
- Bank statements (interest received and fees)
- Share dividend statements
- Contract notes for buy/sell transactions
- Dividends information

### Investment Property

- Date property was purchased
- Number of weeks property was rented
- Rental statement from agent or rent received
- Advertising
- Agents fees
- Bank fees
- Borrowing expenses
- Capital costs
- Cleaning, gardening & lawn mowing
- Corporate body fees & strata levy
- Council rates
- Insurance
- Land tax
- Loan interest
- Repairs and maintenance
- Water charges
- Depreciation Schedule

### Deductions

- Receipts or work-related deductions
  - laundry, clothes, protective items
  - Subscription/membership fees
  - Union fees
  - meals, travel
  - car expenses (kilometres, log book, letter from employer)
  - tools and equipment
  - home office expenses
  - Any other costs incurred earning income
- Motor Vehicle Cents per Kilometre
  - Expense Declaration
- PAYG Instalment Notices paid

### Investment Related Deductions

- Fees for tax and financial planning
- Amounts paid to superannuation
- Self-education receipts
- Donations
- Income Protection Insurance
- Interest on borrowing for investment purposes
- Asset purchase agreements
- Asset sale documents
- Spouse name, date of birth and taxable income
- Private health insurance statement
- Children's names and dates of birth