



Individual Tax Return Checklist

Name of taxpayer: _____

Address: _____

Preferred contact no.: _____

Information	Information provided	Not applicable
Income		
PAYG payment summaries (eg from employers)	<input type="checkbox"/>	<input type="checkbox"/>
Lump sum payments (eg employment termination payment)	<input type="checkbox"/>	<input type="checkbox"/>
Partnership distribution statement, including copy of partnership's tax return	<input type="checkbox"/>	<input type="checkbox"/>
Trust distribution statement, including copy of trust's tax return	<input type="checkbox"/>	<input type="checkbox"/>
Documentation re foreign source income, foreign assets or property	<input type="checkbox"/>	<input type="checkbox"/>
Bank statements stating interest earned, including for term deposits	<input type="checkbox"/>	<input type="checkbox"/>
Dividend statements	<input type="checkbox"/>	<input type="checkbox"/>
Employee share scheme statements	<input type="checkbox"/>	<input type="checkbox"/>
Managed fund annual tax statement and capital gains tax statement	<input type="checkbox"/>	<input type="checkbox"/>
Buy/sell contract notes for shares (if any shares were sold)	<input type="checkbox"/>	<input type="checkbox"/>
Work-related deductions		
Details of depreciable assets bought during the year (eg laptops)	<input type="checkbox"/>	<input type="checkbox"/>
Details and receipts for home office expenses	<input type="checkbox"/>	<input type="checkbox"/>
Professional journals/trade magazines	<input type="checkbox"/>	<input type="checkbox"/>
Professional memberships/subscriptions	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for continuing professional development courses and seminars	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for self-education expenses	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for other work-related deductions such as protective clothing, uniform expenses, tools and equipment, and travel	<input type="checkbox"/>	<input type="checkbox"/>
Vehicle logbook for motor vehicle expenses (if using the logbook method)	<input type="checkbox"/>	<input type="checkbox"/>
Other deductions		
Receipts for donations of \$2 and over to registered charities	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in managing tax affairs (eg tax agent's fees)	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in earning interest, dividend and other investment income (eg investment advice fees)	<input type="checkbox"/>	<input type="checkbox"/>
Income protection insurance premiums	<input type="checkbox"/>	<input type="checkbox"/>

Information	Information provided	Not applicable
<p>Rental properties</p> <p>Date when property was purchased, including details of co-ownership if applicable</p> <p>Period property was rented out during the income year</p> <p>Records detailing rental income (annual statement from property agent, if engaging services of an agent)</p> <p>Loan statements for property showing interest paid for the income year</p> <p>Expenses incurred such as water charges, land tax and insurance premiums</p> <p>Details of depreciable assets bought or disposed of during the year</p> <p>Details of any capital works on the property</p> <p>If the property was disposed of during the income year, information relating to dates and costs associated with the disposal of the property</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<p>Offsets/rebates</p> <p>Details of any superannuation contributions for spouse</p> <p>Details of medical expenses where the total exceeds \$2,218 (after Medicare and private health fund rebates)</p> <p>Details of dependants, including their age, occupation and income</p> <p>Private health insurance statement (and details of prepaid premiums)</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<p>If operating as a sole trader</p> <p>Cashbook, which includes records of drawings taken before the business takings were banked</p> <p>Copies of Business Activity Statements lodged</p> <p>Copies of PAYG summaries for employees</p> <p>Details of any government grants, rebates or payments received</p> <p>Details of superannuation contributions for employees</p> <p>Details of any assets purchased, including date of purchase and amount</p> <p>Payments of salaries and superannuation to associates</p> <p>Records from accounting software (eg trial balance, profit and loss, and balance sheet)</p> <p>Statements of all liabilities of the business</p> <p>Notice of superannuation contributions for self-employed persons</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<p>Other information</p> <p>Copies of Instalment Activity Statements lodged</p> <p>Any other information that you think is relevant</p>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>

Notes: _____
