

# Camden Valley

## Financial Solutions

### INDIVIDUAL TAX RETURN CHECKLIST

#### Income

- Salary or Wages
- Centrelink Payments and Pensions
- Eligible Termination Payments (ETP)
- Interest
- Dividends
- Managed Funds or Trusts
- Foreign Income
- Rental Income
- Capital Gains/Loss  
(Sale Property or Shares)

#### **DOCUMENTATION REQUIRED**

- PAYG Payment Summaries/Group Certificates from All Employers
- PAYG Payment Summary
- ETP Payment Summary
- Bank Statements
- Dividend Statements
- Annual Tax Summary
- Bank Statement or Notice
- Agent Report or Statements
- Purchase or Sale of Assets Documents

#### Deductions

- Work Related Expenses
  - o Motor Vehicle
  - o Travel Expenses - Carwash, Parking, Tolls, Overnight Travel, Accommodation
  - o Work Uniform or Protective Clothing
  - o Self-Education Expenses
  - o Other Work Related Expenses- Union fees, Sickness & Accident Insurance/ Income Protection
  - o Stationery, Home Office, Computer, Telephone, Mobile, Tools, Equipment, Books, Sun Protection
- Other Deductions
  - o Interest or Dividends
  - o Charitable Gifts or Donations
  - o Prior Year Tax Agent's Fees
  - o Prior Year Losses
  - o UPP of Foreign Pension
  - o Rental Property Expenses (repairs & maintenance, agent's fees, travel, rates/ insurance, body corporate, capital improvement)

- Logbook, Diary & Receipts
- Receipts
- Receipts
- Receipts
- Receipts
- Receipts
- Bank or Dividend Statements
- Receipts (Raffles & Donations w/ Prizes NOT included)
- Receipt
- Previous Tax Return
- Pension Documentation
- Agent's Report and/or Receipts

#### Other Information

- HECS/Other Study Debts

- PAYG Payment Summary

#### Tax Offsets

- Spouse's Income Details
- Superannuation Annuity or Pension
- Private Health Insurance
- Medical Expenses

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- Payment Summary from your Payer
- Health Fund Statement
- Details & Receipts

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