

## Individual Tax Return Checklist

<b><u>Income</u></b>	<b><u>What to Bring</u></b>
Salary or Wages Centrelink Payments/Pensions Interest Eligible Termination Payments (ETP) Dividends Managed Funds or Trusts Foreign Income Rental Income  Capital Gains/Loss (Sale property or Shares) Any other Income	<input type="checkbox"/> PAYG Payment Summaries/Group Certificates <input type="checkbox"/> Centrelink PAYG Payment Summary <input type="checkbox"/> Bank Statements <input type="checkbox"/> ETP Payment Summary <input type="checkbox"/> Dividend Statements  <input type="checkbox"/> Bank Statement or Notice <input type="checkbox"/> Agent Report or Statements <input type="checkbox"/> Purchase or Sale of Assets Documents <input type="checkbox"/> Records of the Amounts received
<b><u>Deductions</u></b>	<b><u>What to Bring</u></b>
<b>Work related Expenses:</b> * Motor Vehicle * Travel Expenses - Carwash, Parking, Tolls, Overnight Travel, Accomodation * Work Uniform.Protective clothing * Self Education Expenses * Other work related expenses - Union fees, sickness & accident insurance/Income Protection * Stationary, Home Office, Computer, Telephone, Mobile, Tools,Equipment,Books, Sun Protection Other Deductions * Interest or Dividends * Charitable Gifts * Undeducted Purchase Price (UPP) of Annuity * Prior Years Tax Agents Fees * Prior Years Losses * UPP of Foreign Pension * Rental Property Expenses (repairs & maintenance, agents fees, travel, rates/insurance ,body corporate, capital improvement)	<input type="checkbox"/> Log Book, Diary, Receipts  <input type="checkbox"/> Receipts <input type="checkbox"/> Receipts <input type="checkbox"/> Receipts  <input type="checkbox"/> Receipts  <input type="checkbox"/> Receipts  <input type="checkbox"/> Bank or Dividend Statements <input type="checkbox"/> Receipts (Raffles & Donations w/Prizes not included) <input type="checkbox"/> Details as provided by Super Fund <input type="checkbox"/> Invoice/Receipt <input type="checkbox"/> Previous Tax Return <input type="checkbox"/> Pension Documentation <input type="checkbox"/> Agents Report and/or Receipts
<b><u>Other Information</u></b>	
* HECS/Other Study Debts	<input type="checkbox"/> Statement
<b><u>Tax Offsets</u></b>	
* Spouse's Income Details * Superannuation Annuity or Pension * Private Health Insurer * Medical Expenses * Education Tax Refund	<input type="checkbox"/> PAYG Payment Summaries <input type="checkbox"/> Payment Summary from Payer <input type="checkbox"/> Health Fund Statement <input type="checkbox"/> Details& Receipts <input type="checkbox"/> Receipts-computers , computer items,textbooks etc