

Individual Taxation Checklist



Income

- Payment Summaries
- Interest Income
- Dividend Statements for dividends received or reinvested
- Annual Tax Statements from Managed Funds
- Government Payment Statements, if received
- Other Income
 - Rental Properties
 - Business
 - Foreign Income
 - Capital Gains
 - Employee Share Schemes
- Lump Sum and Termination Payment Summaries
- Farm Management Deposits and Repayments

Deductions

- Work related Expenses
 - Motor Vehicle, kilometres travelled OR logbook percentage and expenses
 - Travel (fares and accommodation)
 - Uniforms/Protective Clothing
 - Self education and self development
 - Work related - Union, registrations, tools, subscriptions, membership, home office, seminars, conferences, telephone, computer & internet
- Donations to charities
- Income Protection Insurance
- Personal Superannuation Contributions

Other

- Health Insurance Statements
- Details of PAYG Instalments paid
- Spouse details including taxable income
- Child Support paid during year
- Bank Account details for refund, including BSB, Account Number and Name