



Individual Income Tax Return Checklist

Income

- PAYG summary statement
- Australian Government Allowances (i.e. Newstart, Youth Allowance etc)
- Other Income (Director Fee / allowances / bonuses / tips / consulting fees / honoraria)
- Bank Statements (Interest received / fees charged)
- Trust or Partnership Distribution Statement
- Share Dividend Statement
- Managed Fund Statements
- Statements of any Capital Assets sold (i.e. shares / property etc)
- Lump Sum Payment Statement (e.g. Eligible Termination Statements)
- Business Income
- Foreign Source Income

Rental Income

- Rental income received
- Annual Agent's Statement (if applicable)

AND / OR

- Invoices for any amounts paid personally (i.e. Council rates / water rates / insurance etc.)

Deductions

- Receipts of Donation to Charities
- Receipts of Work Related Car Expenses
- Receipts of Work Related Travel Expenses
- Receipts of Self Education Expenses (i.e. Fees / books / computer costs / travel expenses)
- Receipts of other Work Related Expenses (i.e. home office expenses / laundry / memberships / overtime meals / seminars / subscriptions / telephone / tools and equipment / union fees)
- Depreciable Items (i.e. Purchase of assets worth > \$300 for work / any assets sold)
- Bank statements of funds borrowed to purchase investments
- Receipts of Income Protection Insurance
- Personal Superannuation Contributions

Other Information

- Private Health Insurance Statement
- Out of pocket Medical Receipts (If spent more than \$1,500)