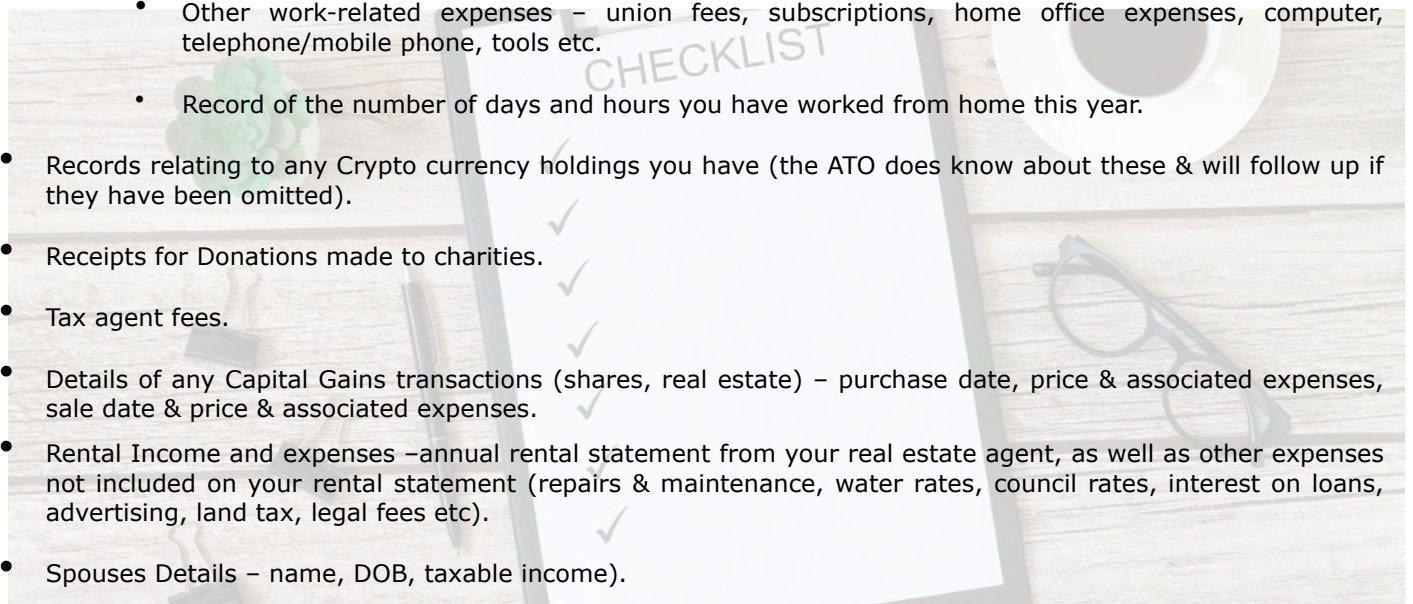


Individual Tax Return Checklist

Having all your information ready means we can have your tax return completed in a quick and painless way

- Payment Summaries are no longer issued to you in paper form, however your details are available from your MyGov account. We have access to this.
- Details of any bank interest earned
- Details of any dividends received
- Centrelink statements are no longer issued to you in paper form, however your details are available from your MyGov account. We have access to this.
- Child support payments that you have paid.
- Private Health fund statements are no longer issued in paper form, however if you want to you can access your information through your health fund. We have access to this information through the ATO.
- Receipts for work related expenses:
 - Work related car expenses – you must have evidence of this with a logbook or diary.
 - Work related travel expenses – receipts are required for accommodation, airfares, meals etc. Truck drivers must have receipts for all expenses & logbook evidence of nights away.
 - Work related uniform/clothing expenses
 - Work related self-education expenses – course fees, stationary, textbooks etc.
 - Other work-related expenses – union fees, subscriptions, home office expenses, computer, telephone/mobile phone, tools etc.
 - Record of the number of days and hours you have worked from home this year.
- Records relating to any Crypto currency holdings you have (the ATO does know about these & will follow up if they have been omitted).
- Receipts for Donations made to charities.
- Tax agent fees.
- Details of any Capital Gains transactions (shares, real estate) – purchase date, price & associated expenses, sale date & price & associated expenses.
- Rental Income and expenses – annual rental statement from your real estate agent, as well as other expenses not included on your rental statement (repairs & maintenance, water rates, council rates, interest on loans, advertising, land tax, legal fees etc).
- Spouses Details – name, DOB, taxable income).
- Bank account details – BSB & Account number



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Payment is required prior to the lodgement of your return