

Income Tax Return Checklist

Please use this checklist and bring with you any relevant information

INCOME

- Previous years Tax Return
- Income Statement – via MyGov account
- Lump Sum & Termination Payment Summaries
- Government payment statements (if received)
- Bank/Investment account statements showing interest earned
- Dividend Statements
- Rental properties
 - Bank loan statements, Management statement from Agent
 - Depreciation schedule (if applicable)
 - Receipts for expenses
- Capital gains
 - Rental property settlement statements
 - Statements from shares sold
- Business Income
 - Income & Expenses Schedule

DEDUCTIONS

- Work related expenses
 - Motor vehicle, log book
 - Travel & Accommodation expenses
 - Uniforms
 - Union fees, registrations, tools, subscriptions, memberships
 - Home office, seminars, conferences, telephone, internet, computer
 - Any other costs incurred earning income
- Donations to charities
- Income Protection Insurance

OFFSETS

- Private Health Insurance statement
- Spouse details including taxable income
- PAYG Instalment paid

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