

## INDIVIDUAL TAX RETURN CHECKLIST

1<sup>st</sup> July 2021 to 30<sup>th</sup> June 2022

PLEASE FILL IN THESE DETAILS BEFORE RETURNING THIS FORM VIA EMAIL

Name:

Address:

Home No:

Email Address:

Mobile No:

Occupation:

### INCOME

### DEDUCTIONS

#### Income statements

#### Motor vehicle claims

- From ALL employers for current year
- From Centrelink
- From pension funds
- Statement of termination payments
- Employee Share Scheme statements

- Details of the motor vehicle
- List of expenses
- Details of trips showing kilometres travelled (logbook if prepared)

#### Investment income

#### Diaries/receipts to show proof of the following expense claims

- Details of ALL current bank accounts and interest earned
- Details of ALL accounts closed during the year and interest earned
- Tax summary statements from all managed investment funds
- All dividend notices (most companies pay 2 dividends per year)

- Laundry
- Home office/hours worked from home
- Domestic travel
- Overseas travel
- Self-education
- Telephone, internet, union, sickness & accident insurance etc

#### Rental properties

#### Receipts or summary for all other work-related deductions

- All agent summaries for year (where managed by an agent)
- Details of all receipts for year (where personally managed)
- Details of all expenses paid
- Bank loan statements or interest paid

#### Receipts or summary for all other income related deductions

#### Receipts or summary for all charitable donations

**Details of personal super contributions (self & spouse)** - Provide letter of acknowledgment received from your superfund

#### Other income

#### OTHER INFORMATION

- Details of any other income including any earned overseas (foreign income)

- All statements from private health fund showing rebate eligibility etc
- Confirm any super co-contribution made and if so, how much
- Provide any child support amounts paid during the year
- Names, dates of birth (spouse/children) and income details (if any)

#### Capital gains

- Purchase & sale documentation will be required for disposal of any shares, real estate or unit trusts