

## Tax Return Checklist

To better assist in the preparation of your personal tax return, our team has provided a checklist for you to make sure you don't miss any information.

### INCOME

- Payment Summaries and Income Statements
- Lump Sum and Termination Payment Summaries
- Government payment statements, i.e. Age Pension, Newstart
- Interest income from banks
- Dividend statements and/or Employee share schemes
- Managed Investment tax statements
- Business activities
- Foreign income statements
- Capital gains information
- Rental property information, including:
  - Rental management statement/s
  - Advertising
  - Body corporate fees
  - Cleaning/ Gardening
  - Council rates
  - Insurance
  - Land tax
  - Loan statement/s (including interest on loan)
  - Management fee
  - Repairs and Maintenance
  - Water Rates

### WORK RELATED DEDUCTIONS

- Motor vehicle expenses
- Travel expenses (fares/accommodation/meals)
- Logo uniform/protective clothing
- Self-education and training expenses
- Union fees, registrations
- Memberships, subscriptions
- Home office expenses
- Mobile phone, home internet usage
- Computer expenses (equipment, software, hardware)
- Sun protection products
- Other costs incurred earning income
- Donations to charities
- Income protection insurance
- Personal super contributions

### ADDITIONAL INFORMATION

- Private health insurance statement
- Spouse details including taxable income
- Dependent children
- Bank account details including BSB and account number