



THE CALCULATORS

TAX RETURN CHECKLIST - INDIVIDUAL

Our handy Tax checklist will help you avoid missing out on any deductions and expenses during your appointment with us.

INCOME

- PAYG Payment Summaries & Income Statements
- Eligible Termination Payment
- Payment Statement if received from Centrelink
- Bank Interest
- Annual Tax Statements from Managed Funds
- Share Dividend or Reinvested Statements

OTHER INCOME

- Rental Properties including Airbnb etc.
- Business Income including Uber etc.
- Government Payment statement if received
- Capital Gains including Crypto etc.
- Employee Share Schemes

OFFSETS & REFUND

- Health Insurance & Rebate Entitlement Statement
- Health Insurance & Rebate Entitlement Statement
- Zone or Overseas Offset if Applicable

DEDUCTIONS & EXPENSES

- Motor Vehicle
- Travels (fares & accommodations)
- Uniform / Work & Safety Wear
- Self Education & Professional Developments
- Membership Fee, Subscription, Union etc.
- Home Office Running Expenses
- Fee Charged For Previous Year's Tax Return
- Telephone, Internet, Mobile etc.
- Any other addition Cost Incurred Earning Income
- Donations to Charities (not raffle to win prizes)
- Income Protection Insurance
- Any Extra Superannuation Contributions
- Rental Property Expenses
- Investment Expenses
- Records of Sales & Purchase of Business / Property

OTHER DETAILS

- Spouse details including Taxable & Exempt Income
- Government Debts
- Bank Account Details

If you have any questions, feel free to reach out to us at 08 8989 2999.