



## TAX RETURN CHECKLIST – INDIVIDUALS

Please check the following list. Bring along all relevant documentation to support in the preparation of your income tax return

### Personal:

- Tax File Number
- Drivers Licence
- ABN Number (if applicable)
- Medicare card

### Income:

- Government Pensions and Allowances
- PAYG Payment Summary Statement (Group Certificates)
- Bank Interest
- Lump Sum and termination payments
- Other Pensions and/or annuities
- Allowances (eg. Travel, car etc.)
- Private health insurance details
- Dividends
- Distributions from partnerships or trusts
- Rental Property Income Statements
- Rental property expenses/maintenance
- Details of any assets sold that were used for income earning purposes or may be subject to capital gains tax. Also provide details of original purchase price.

### Rebates:

- Private health insurance
- Spouses income and tax file number
- Centrelink statements
- Pensions and annuities
- Spouse's superannuation contributions
- Medicare exemptions
- Zone Rebates
- Medical Expenses Rebate (total and permanent disability)

### Deductions:

- Award transport allowance claims
- Accident Insurance Premiums
- Bank charges on deposits of income and deductible expenditure
- Interest
- Union fees
- Bridge/road tolls (travelling for business)
- Car Parking (travelling for business)
- Conventions, conferences and seminars
- Depreciation of library, tools of trade, business equipment (including portion of home computer)
- Home office – Electricity usage
- Interest on loans on equipment or income earning investments
- Interstate/overseas travel with or without travel allowance
- Laundry/maintenance of uniforms and protective clothing
- Motor vehicle expenses
- Log book (number of business kms)
- Protective clothing – Sunscreen, hat, sunglasses (depending on occupation)
- Work related self-education expenses
- Work related stationary, briefcase/computer case etc.
- Subscriptions to professional associations
- Reference materials and journals
- Tax Agent fees
- Work related phone expenses
- Donations

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