



## Income Tax Return Checklist – Individuals

Please using the following checklist to ensure that you bring the necessary information required to lodge your tax return.

### Income

- Payment Summaries (Group Certificates) This should be provided by your employer.
- Government payment statements, such as Newstart or Disability Pension payments
- Lump Sum and/or Termination Payment Summaries
- Any Interest earned from banks accounts
- Dividend statements for dividends received or reinvested
- Any money made from house sharing or taxi services, such as Uber or Airbnb
- Business Profit and Loss statement
- Annual Statements of any other income:
  - Rental properties (Income and Expenses)
  - Trusts, Managed Funds
  - Foreign income
  - Capital gains
  - Employee share schemes

### Deductions:

- Work related expenses:
  - Motor vehicle - (Log book or receipts)
  - Travel (Taxi fares, accommodation or parking fees)
  - Uniforms/work-wear required for your role
  - Self-education and professional development
  - Union, registrations, tools, subscriptions, memberships
  - Home office, seminars, conferences
  - Telephone, computer, internet
  - Any other costs incurred to produce income
- Donations to charities or building funds (Donations that involve a prize or you receive a gift in return cannot be included as a deduction)
- Income protection, Sickness and Accident insurance
- Private Health Insurance Tax Statement (This should be provided by your Private Health Insurance)
- Personal superannuation contributions
- Any HELP debt or Financial Supplement loans
- Interest and fees on investment loans

### Offsets and Refunds:

- Health insurance and rebate entitlement statement
- PAYG instalments
- Spouse details including taxable income to check if you may be eligible for tax benefits.