



PEACOCKE

ACCOUNTANTS

Income Tax Return Checklist – Individuals

Please use this checklist and bring any relevant information with you as we cannot be sure when the Australian Tax Office Portal will have these details available.

Income

- Payment Summaries
- Lump Sum and Termination Payment Summaries
- Government payment statements, if received
- Interest income from banks and building societies
- Dividend statements for dividends received or reinvested
- Annual Tax Statements from managed funds
- Other income:
 - Rental properties
 - Business
 - Foreign income
 - Capital gains
 - Employee share schemes

Deductions

- Work-related
 - expenses:
 - Motor vehicle
 - Travel (fares and accommodation)
 - Uniforms/protective workwear, sunglasses, hats, sunscreen, certain footwear
 - Self-education and professional development
 - Union, registrations, tools, subscriptions, memberships
 - Home office, postage/printing, seminars, conferences
 - Telephone, computer, internet – proof of usage required
 - Any other costs incurred earning income
- Donations to charities or building funds
- Income protection insurance

Offsets and refunds

- Health insurance and rebate entitlement statement
- IAS statements or details of PAYG instalments paid
- Spouse details including taxable and exempt income
 - Prior tax agent fees if applicable

Tax refunds – the Tax Office no longer issues refunds by cheque so you must bring your bank account details, including the BSB and account number with you to your appointment.