Income Tax Return Checklist – Individuals

Please use this checklist and bring any relevant information with you as we cannot be sure when the Online Services For Agents will have these details available.

INCOME

- ☐ Payment Summaries and Income Statements* 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 F
- ☐ Other income: Rental properties business
  - ☐ Foreign income capital gains
  - ☐ Employee share schemes

DEDUCTIONS

- ☐ Work related expenses: Motor vehicle
  - ☐ Travel (fares and accommodation) Uniforms/workwear
  - ☐ Self-education and professional development
  - ☐ Union, journals, tools, subscriptions and memberships Home office, seminars, conferences
  - ☐ Telephone, computer, internet
  - ☐ 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 instalment
- ☐ paid Spouse details including taxable and exempt income
- ☐

TAX REFUNDS – the Tax Office no longer issues refunds by cheque. Please ensure your bank account details, including the BSB and Account Number are correct.

*** End-of-year payment summary changes**

The way most employers report tax and super information has changed. This means you will no longer receive an end-of- year payment summary from your employer, now called Income Statement.

We can download your income statement for you on request at any time. We can also view your income statement information when we complete your return and don’t require that you bring your income statement to your appointment.