

# TAX RETURN CHECKLIST



Individual  
Tax Return



ASC  
*Accountants*

# PREPARE YOUR TAX RETURN Steps

## 1 Book

- Book your appointment with us via phone, email or website
- Provide general information Following our prompts on our online booking system

[Click here for website booking.](#)

## 2 Gather

- Gather the information required as per this checklist

## 3 Meet and Greet

- Once we've reviewed all your information, we'll be ready for a chat to finalise your return and answer any tax-related questions you might have. We offer email, Zoom or phone calls meetings

## 4 That's All

- After your tax return is finalised, we will send it to you for electronic signing - no printing required
- After you sign and pay our preparation fee, we will lodge your return to the Australian Taxation Office (ATO). The ATO will then process your return and any tax refund due will automatically be deposited into your nominated account





# TAX RETURN CHECKLIST

## INDIVIDUAL TAX RETURN

### INCOME

- Salary and Wages (Tax Ready Income Statements)
- Annual Bank Interest Summaries
- Dividends Statements
- Annual Tax Statements from Managed Funds
- Purchase and Sale Documents for any share sales
- Foreign Income

### DEDUCTIONS:

- Work Related Car Expenses
- Work-related Travel Expenses
- Uniform/Protective Clothing Purchases
- Union, Registrations, Subscriptions Fees
- Telephone, Computer and Internet Costs
- Home Office, Seminars, Conferences
- Tools and Equipment (including work bags)
- Licences, Registrations and Insurance
- Any other work-related expenses
- Donations
- Income Protection Insurance
- Additional Personal Superannuation Contributions
- Tax Agent Fees



### OTHER:

- Annual Private Health Insurance Statement
- Details of Spouse Income
- Bank Details
- Previous Year Tax Return

# Get in touch

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