

Waterford Taxation Services

www.waterfordtax.com.au | tax.returns@live.com.au | 0412 804 927

Tax Return Check List

Income

- ☐ Income Statement / PAYG Payment Summary
 - ☐ Employment Termination Payments
 - ☐ Centrelink payment summaries
 - ☐ Superannuation fund payments
 - ☐ Dividend statements
 - ☐ Interest income
 - ☐ Employee Share Schemes
 - ☐ Cryptocurrency wallet statements
 - ☐ Buy / Sell statements for shares
 - ☐ Tax statements from managed funds
 - ☐ Trust distribution statements
 - ☐ Income stream statements
 - ☐ Life insurance payments
 - ☐ Worker's compensation payments
 - ☐ Business income
 - ☐ Rental property income including short stays
-

Deductions

Receipts / invoices / diaries

- ☐ Motor vehicle / lease statements
 - ☐ Travel (fares, accommodation, meals etc)
 - ☐ Laundry
 - ☐ Uniform purchase list
 - ☐ Self education expenses
 - ☐ Union / Association fees
 - ☐ Registration fees
 - ☐ Telephone (know your work use %)
 - ☐ After tax super contribution
 - ☐ Tax agent fees
 - ☐ Internet (know your work use %)
 - ☐ Batteries
 - ☐ Home office hours
 - ☐ Assets, including laptops, printers, computers, tablets, monitors etc
 - ☐ Tools & equipment (sorted under \$300 / over \$300)
 - ☐ Repairs
 - ☐ Donations (itemised list)
 - ☐ Income protection insurance
-

Other

- ☐ Details of dependants including name, date of birth, income amounts
- ☐ Spouse name, date of birth and their income amounts
- ☐ Private Health Insurance statement
- ☐ Additional super contributions including notice of intent to claim
- ☐ New client? Photo ID for proof of identity