

Individual Tax completeness checklist	Yes/No/ N/A	Provided	Notes
INCOME			
Employment (including termination payments)			Payment Summaries and Income Statements if not already reflecting as "tax ready" in MyGov
Government payment statements, if received			
Investment income			Include investment statements to identify relevant investment costs
Income from Managed Funds			Include investment statements and supporting information (Annual Tax statement)
OTHER INCOME			
Rental properties			Include rental agent statements. Include annual statements for Airbnb, Stayz, etc.
Business (sole trader income)			Include list of business income and expenses. Including sharing economy income, e.g. Uber, Airtasker
Capital gains			Provide details including sale of property and sale of investments. Cryptocurrency transactions and tax statements
Income protection insurance payouts			This is not provided to the ATO by the insurers, hence please provide if applicable
Any other income (foreign, share schemes)			Please provide detail
DEDUCTIONS (Work related expenses)			
Motor vehicle			Claim a per kilometre rate for business travel (require to be backed up by calendar entries) limit to 5000kms per year. OR logbook method, claim actual costs X % work use
Travel (fares and accommodation)			Tolls, Parking, include while working away from home
Uniforms/work-wear			
Work related self-education and professional development			
Work related union, registrations, tools, subscriptions, memberships			
Home office running expenses			Can claim 70c/hr for working from home under the fixed rate method, but need to keep records of actual hours worked. Alternative claimed actual cost X business %
Work percentage of mobile phone, computer, internet			Can only claim if not claiming above
Work related seminars, conferences			
OTHER			
Prior year tax return preparation fee			
Rental property expenses			Rates, Body Corporate, Interest, Water, Capital additions, Repairs and Maintenance, Property Tax Depreciation Schedules
Donations to charities or building funds			We can claim a tax deduction if the charity is a deductible gift recipient (DGR)
Income protection insurance payments if paid outside super fund			
Any other costs incurred earning income			Please contact us if unsure
OFFSETS AND REFUNDS			
Private Health insurance and rebate entitlement statement			Statement required to determine Medicare Levy Surcharge status.
IAS statements or details of PAYG instalments paid			
Superannuation contributions (Personal contributions not through employer)			Provide contribution receipts. Ensure you provide a valid notice of intent to your Super fund to claim a personal super contribution deduction
Keep all tax records for at least 5 years. For assets, subject to capital gains, retain records from time of purchase until 5 years after sale			