Australian Tax Return – Simple Checklist

1. Personal Details:

You will be sent a secure link from the software Seamlss to gather your:

- ☐ Name, DOB, TFN
- ☐ Current address, phone, email
- ☐ Bank account for refund

You will need to confirm your spouse's details at your appointment and provide a copy of your prior tax return and/or Notice of Assessment.

2. Income:

Please note that some of this information may be available on the ATO prefill report (for example employment income, bank interest and Centrelink Income). Please ensure you review and bring any other details to your appointment.

- ☐ Employment income (Income Statements via MyGov)
- ☐ Centrelink or pension payments
- ☐ Interest, dividends, managed funds
- ☐ Share, crypto, or asset sale details
- ☐ Rental property income & agent statements
- ☐ Business/sole trader income & expenses
- ☐ Superannuation payments (pension/lump sum)
- ☐ Foreign income

3. Deductions:

- ☐ Work-related expenses (car, home office, phone, tools, education)
- ☐ Rental property expenses
- ☐ Donations to DGR charities
- ☐ Tax agent fees
- ☐ Personal super contributions
- ☐ Income protection insurance

4. Offsets & Other Info:

- ☐ Private health insurance statement
- ☐ Spouse contributions
- ☐ HECS/HELP details
- ☐ Child support payments
- ☐ ATO letters or notices

5. Final Check:

- ☐ All income included
- ☐ Receipts/logbooks available