

Individual Tax Return Checklist - June 2025

Income

- ☐ Employer Income Statement
- ☐ Bank Statements
(interest received / fees charged)
- ☐ Summary of Investments
- ☐ Share Dividend Statements
- ☐ Trust / Partnership Distribution Statements
- ☐ Managed Fund Statements
- ☐ Social Security Summary Statements
- ☐ Lump Sum Payment Statements
(ie. Eligible Termination Statements)
- ☐ Business Income
(please complete the Business Income Checklist)
- ☐ Sale of assets with potential CGT
implications
(ie. Buy / Sell Share Contract Notes)
- ☐ Other Income
- ☐ Spouse/Partner's Taxable Income

Deductions

- ☐ Work related car expenses
(please complete Motor Vehicle Checklist)
- ☐ Work related travel expenses
(ie. meals, accommodation, care hire, tolls, taxis, parking
etc.)
- ☐ Work related uniform
(ie. compulsory uniform, protective clothing, dry cleaning of
uniform etc.)
- ☐ Work related self education expenses
(ie. fees, books, computer costs, travel expenses etc.)

Deductions

- ☐ Receipts of home office expenses
(please complete the Home Office Expenses Checklist)
- ☐ Other work related expenses
(ie. union fees, memberships, books/reference material,
telephone/internet, tools or equipment etc.)
- ☐ Donation to charities
- ☐ Business Expenses
(please complete the Business Income Checklist)
- ☐ Interest deductions on funds borrowed to
purchase investments
- ☐ Income Protection Insurance
- ☐ Other Expenses

Rental Income

- ☐ Please refer to Rental Property Income
and Expenses Checklist

Other Information

- ☐ Copies of Instalment Activity Statements
- ☐ Superannuation Contributions
(on behalf of your spouse)

New Clients

- ☐ Prior Year's Income Tax Return
- ☐ Prior Year Accountancy Fees



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