

Individual Tax Return Checklist - June 2023

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 complete 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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