

Individual Tax Return Checklist

Personal Information

- ☐ Tax File Number (TFN)
- ☐ Photo ID (e.g. driver's licence or passport)
- ☐ Contact details (address, phone, email)
- ☐ Bank account details for refund
- ☐ Spouse's full name, date of birth and income details
- ☐ Number of dependent children
- ☐ Occupation
- ☐ Residency status (e.g. if you lived overseas during the year)

Income Documentation

- ☐ Income Statements or PAYG Payment Summaries from employers
- ☐ Government/Centrelink payments (e.g. pensions, unemployment, student benefits)
- ☐ Bank interest statements
- ☐ Dividend statements (including franking credits)
- ☐ Partnership or Trust investment tax statements
- ☐ Rental income and expenses
 - ☐ Loan interest
 - ☐ Agent fees
 - ☐ Insurance
 - ☐ Water, rates & land tax
 - ☐ Depreciation
 - ☐ Repairs & maintenance
 - ☐ Body Corporate/Strata fees
- ☐ Sole trader business income and expenses
- ☐ Cryptocurrency or foreign exchange trading income
- ☐ Foreign income (employment, pensions, etc.)
- ☐ Employee share schemes (ESS) documentation
- ☐ Lump sum or termination payments
- ☐ Superannuation income streams or lump sum payments
- ☐ Asset sales and their original cost documents

Deduction Documentation

- ☐ Work-related expenses:
 - ☐ - Motor vehicle (logbook or cents per km)
 - ☐ - Travel (domestic/international)
 - ☐ - Home office (hourly log or actual cost method)
 - ☐ - Uniforms/protective clothing
 - ☐ - Union fees and professional memberships
 - ☐ - Other work-related purchases
- ☐ Self-education expenses
- ☐ Charitable donations (receipts for donations over \$2)
- ☐ Income protection insurance premiums
- ☐ Interest on investment loans (e.g. property, margin loans)
- ☐ Tax agent/accounting fees
- ☐ Child support payments
- ☐ Private health insurance details
- ☐ Interest paid on ATO debts
- ☐ Superannuation contributions (personal, not employer)
 - ☐ Include "Notice of Intent to Claim" form if claiming a deduction

Other Relevant Information

- ☐ Previous year's tax return (optional but helpful)
- ☐ Investment HIN and SRN plus current portfolio (optional but helpful)
- ☐ Any changes in employment or financial situation
- ☐ Any changes in address or bank details from prior years
- ☐ Changes in marital status