

## 2023 INDIVIDUAL TAX RETURN CHECKLIST

Name of taxpayer: \_\_\_\_\_ Address: \_\_\_\_\_

Preferred contact no: \_\_\_\_\_

INCOME	INFORMATION PROVIDED	N/A
PAYG payment summaries (eg from employers)/ income statements	<input type="checkbox"/>	<input type="checkbox"/>
Lump sum payments (eg employment termination payment)	<input type="checkbox"/>	<input type="checkbox"/>
Partnership distribution statement, including copy of partnership's tax return	<input type="checkbox"/>	<input type="checkbox"/>
Trust distribution statement, including copy of trust's tax return	<input type="checkbox"/>	<input type="checkbox"/>
Documentation re foreign source income, foreign assets or property	<input type="checkbox"/>	<input type="checkbox"/>
Bank statements stating interest earned, including for term deposits	<input type="checkbox"/>	<input type="checkbox"/>
Dividend statements	<input type="checkbox"/>	<input type="checkbox"/>
Employee share scheme statements	<input type="checkbox"/>	<input type="checkbox"/>
Managed fund annual tax statement and capital gains tax statement	<input type="checkbox"/>	<input type="checkbox"/>
Buy/sell contract certificates for shares (if any shares were sold)	<input type="checkbox"/>	<input type="checkbox"/>

WORK-RELATED DEDUCTIONS	INFORMATION PROVIDED	N/A
Details of depreciable assets bought during the year (eg laptops)	<input type="checkbox"/>	<input type="checkbox"/>
Details and receipts for home office expenses	<input type="checkbox"/>	<input type="checkbox"/>
Professional journals/trade magazines	<input type="checkbox"/>	<input type="checkbox"/>
Professional memberships/subscriptions	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for continuing professional development courses and seminars	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for self-education expenses	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for other work-related deductions such as protective clothing, uniform expenses, tools and equipment, and travel	<input type="checkbox"/>	<input type="checkbox"/>
Vehicle logbook for motor vehicle expenses (if using the logbook method)	<input type="checkbox"/>	<input type="checkbox"/>

OTHER DEDUCTIONS	INFORMATION PROVIDED	N/A
Receipts for donations of \$2 and over to registered charities	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in managing tax affairs (eg tax agent's fees)	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in earning interest, dividend and other investment income (eg investment advice fees)	<input type="checkbox"/>	<input type="checkbox"/>
Income protection insurance, or sickness and accident premiums	<input type="checkbox"/>	<input type="checkbox"/>
Additional super contributions including the notice of intent to claim from the super fund	<input type="checkbox"/>	<input type="checkbox"/>

<b>RENTAL PROPERTIES</b>	<b>INFORMATION PROVIDED</b>	<b>N/A</b>
Date when property was purchased, including details of co-ownership if applicable	<input type="checkbox"/>	<input type="checkbox"/>
Period property was rented out during the income year	<input type="checkbox"/>	<input type="checkbox"/>
Records detailing rental income and expenses (annual statement from property agent, if engaging services of an agent)	<input type="checkbox"/>	<input type="checkbox"/>
Loan statements for property showing interest paid for the income year	<input type="checkbox"/>	<input type="checkbox"/>
Expenses incurred such as water charges, land tax and insurance premiums	<input type="checkbox"/>	<input type="checkbox"/>
Details of depreciable assets bought or disposed of during the year	<input type="checkbox"/>	<input type="checkbox"/>
Details of any capital works or additions on the property	<input type="checkbox"/>	<input type="checkbox"/>
If the property was disposed of during the income year, information including the purchase and sale documents, solicitor fees, settlement sheets, agents commission and advertising, etc	<input type="checkbox"/>	<input type="checkbox"/>

<b>OFFSETS/REBATES</b>	<b>INFORMATION PROVIDED</b>	<b>N/A</b>
Details of any superannuation contributions for spouse	<input type="checkbox"/>	<input type="checkbox"/>
Spouse or Defacto partner's income, date of birth and full name	<input type="checkbox"/>	<input type="checkbox"/>
Details of dependants, including their age, occupation and income	<input type="checkbox"/>	<input type="checkbox"/>
Private health insurance statement	<input type="checkbox"/>	<input type="checkbox"/>

<b>IF OPERATING AS A SOLE TRADER</b>	<b>INFORMATION PROVIDED</b>	<b>N/A</b>
Cashbook, which includes records of drawings taken before the business takings were banked	<input type="checkbox"/>	<input type="checkbox"/>
Copies of Business Activity Statements lodged	<input type="checkbox"/>	<input type="checkbox"/>
Copies of PAYG summaries/income statements for employees	<input type="checkbox"/>	<input type="checkbox"/>
Details of any government grants, rebates or payments received	<input type="checkbox"/>	<input type="checkbox"/>
Details of superannuation contributions for employees	<input type="checkbox"/>	<input type="checkbox"/>
Details of any assets purchased, including date of purchase and amount	<input type="checkbox"/>	<input type="checkbox"/>
Payments of salaries and superannuation to associates	<input type="checkbox"/>	<input type="checkbox"/>
Records from accounting software (eg trial balance, profit and loss, and balance sheet)	<input type="checkbox"/>	<input type="checkbox"/>
Statements of all liabilities of the business	<input type="checkbox"/>	<input type="checkbox"/>
Notice of superannuation contributions for self-employed persons including notice of intent to claim from the super fund	<input type="checkbox"/>	<input type="checkbox"/>

<b>OTHER INFORMATION</b>	<b>INFORMATION PROVIDED</b>	<b>N/A</b>
Copies of Instalment Activity Statements lodged	<input type="checkbox"/>	<input type="checkbox"/>
Any other information that you think is relevant	<input type="checkbox"/>	<input type="checkbox"/>