

Individual Income Tax Return Checklist

Did you receive?	Y/N	If Yes, this information is required to prepare your return
Salary/Wages/ Allowances/Pensions		Payment summaries received from all employers, government agencies, superannuation funds, annuity payers or overseas pension funds.
Lump sum/Termination Payments		Payment summaries and ETP statements.
Interest		For each account: bank/building society name, account number, amount earned and any income tax amounts withheld.
Dividends received & Employee Share Schemes		For each share: company name, franked and unfranked amounts, and imputation credits (or provided dividend statements). Did you incur any costs to earn this income, such as investment loan interest? For employee share schemes (ESS), your ESS statement.
Business Income		Details of all receipts & all related expenses and copies of all BAS forms lodged and associated calculations.
Investment Income, Partnership or Trust Income		Investment fund name and a copy of annual distribution statement (as provided by the fund manager. Copy of trust/partnership distribution statement(s) from whom the Income was received.
Income from sale of assets		Purchase and sale dates and any associated costs for the sale of assets such as real estate, shares or other capital assets during the Income year.
Rental Income		Property address, gross rent received, details of all expenses relating to each rental property owned including bank loan interest. Refer separate Rental Checklist.
Foreign source Income		Details of income earned, source of income and any Australian tax credits applicable to the Income.
Spouse details for the current year		Your spouse's tax return for the same income year that your tax return is being completed for (unless we are also preparing).

Did you spend money on?	Y/N	If Yes, this information is required to prepare your return
Car Expenses		Make, model and registration number of the car used, Log Book where this method is used, details of expenses, and or distance travelled. How car was purchased i.e. cash/hire purchase/lease/novated lease.
Other Work Travel		For each trip provide details of travel destinations, purpose of trip, costs of travel & accommodation. If travel is for 6 or more continuous nights, do you have a travel diary or itinerary?
Uniform & Protective Clothing		Provide receipts for all items purchased or repaired during the year.
Uniform Cleaning Expenses		For professional dry cleaning & laundering, provide receipts. For home laundry, provide estimate number of work wash loads per year.
Self-Education		Courses of study undertaken and details of all associated expenses.
Sun Protection Items		If you are an outdoors worker you are entitled to claim for sun protection items such as sunscreen, sunglasses, hats etc.
All Other Work-Related Expenses		Details and receipts for all other expenses incurred in relation to your occupation (e.g. union fees) including details of any capital equipment that you use for your work. Provide diary to support any home office use?
Gifts/Donations		Details of charitable organisations and the amount of each donation.
Income Protection Insurance		Details of policy type and premiums paid during the year.
Private Health Insurance Policy		Name of health fund, membership number and type of cover (i.e. hospital/ancillary/combined). Please provide annual tax statement received from health fund.
Net Medical Expenses over \$2,162		Details of all medical expenses and any refunds or reimbursements received from Health Funds (applies if claimed in 2013 and 2014).
Tax Agent fees		Provide receipts for payment of tax agent fees.

Did you?	Y/N	If Yes, this information is required to prepare your return
Live or work in a recognised ATO zone		Number of days actually spent in that zone (generally needs to be at least 183 days to be eligible for tax offset). No longer applies to FIFO workers from 1 July 2015.