Individual Income Tax Return Checklist

INCOME

Did you receive any of the following in the financial year?

- ☐ Salary or Wages
- ☐ Employment Termination Payments
- ☐ Australian Government Allowances/Payments/Pensions
- ☐ Interest income
- ☐ Dividends
- ☐ Rental income
- ☐ Trust or Partnership Distribution
- ☐ Business Income
- ☐ Capital Gains income from sale of shares, property or investment

DEDUCTIONS

Did you incur any of the following expenses in the financial year?

- ☐ Work-related car expenses
- ☐ Work-related travel expenses
- ☐ Uniform/Laundry/Dry cleaning expenses
- ☐ Self-Education expenses
- ☐ Gift/Donation expenses
- ☐ Cost of managing tax affairs
- ☐ Any other work-related expenses

OFFSETS AND OTHER DOCUMENTATION

Do any of the following apply to you?

- ☐ Zone tax offset (only applicable to residence living in zone areas)
- ☐ Private Health Insurance tax offset

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INCOME	What Do I Need to Bring?
Salary or Wages	PAYG payment summary – individual non-business from your employer showing your gross income, total tax withheld and your payer's ABN, Employee Share Scheme and foreign earnings (if applicable)
Employment Termination Payment	PAYG payment summary – employment termination payment from your employer.
Australian Government Pension/Allowance/Payment	A letter from the agency that paid your pension/allowance/payment stating the amount that you received and any tax withheld.
Interest/Dividend/Investment Income	A statement or other documentation from your financial institution that shows your interest income. Statements from the company/public trust, etc that paid you dividends or made the distributions, showing the amount of unfranked and franked dividends, franking credits and any TFN amounts withheld and any foreign earnings.
Rental Income	Rental Summary Statement from your Property Manager and/or: - Details of all rental income earned. - Interest charged on money you borrowed for the rental property. - All other expenses relating to your rental property. - Any expenditure on capital works to the property.
Trust or Partnership Distribution	A copy of the trust or partnership tax return, or a copy of the annual statement from your Managed Trust.
Business Income	Cashbook records or any other records used to record business income and expenses (eg., Spreadsheets or accounting software)
Capital Gains Income	Documents of shares/property showing: - The date you acquired any asset to which a CGT event happened. - The date of the CGT event. - The date and amounts of any expenditure incurred that form the cost base of the CGT event.

DEDUCTIONS	What Evidence Do I Need to Provide?
Work-related Car expenses	- Total kilometres travelled for work to claim on a cents per kilometre basis. - Car logbook and odometer records. - Receipts of your car expenses – receipts, invoices or diary entries.
Work-related Travel expenses	Receipts for work related travel expenses incurred, such as taxi/train fares, accommodation, flights, meals, etc.
Uniform/Laundry/Dry Cleaning expenses	Receipts from your supplier.

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Self-Education expenses	Receipts of tuition fees, textbooks, stationery, student union fees, decline in value of your computer and other costs incurred.
Other work-related expenses	Statements or receipts of any other work-related expenses, such as union fees, subscriptions, overtime meals, seminars or conference expenses, books and professional journals, protective equipment, computers and software, phone and home office expenses.
Gift/Donation expenses	Your receipts for donations, contributions or gifts.
Cost of managing tax affairs	Receipts of expenses relating to preparation and lodgement of your tax returns and activity statements.

OFFSETS	Eligibility
Zone Offset	Did you live and work in a remote area for more than 6 months? Provide details of where you lived/worked, and the number of days spent in that location.
Private Health Insurance	Did you have private health insurance? Please provide your Private Health Insurance Tax Statement with the attached policy details (generally you will receive a statement from your provider)

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