Individual Tax Return Checklist

- [ ] Tax File Number
- [ ] Bank Account Details
- [ ] Spouse Name, DOB, Taxable Income
- [ ] Dependents Name, DOB, Taxable Income
- [ ] Payment Summaries
- [ ] Employment Termination Payments
- [ ] Government Allowances (Newstart, Youth Allowance, Sickness Benefit etc)
- [ ] Government Pensions or similar benefits
- [ ] Superannuation income stream or lump sum
- [ ] Bank or investment interest
- [ ] Dividends
- [ ] Partnership or Trust income
- [ ] Business / ABN income - see ABN Income Tax Checklist
- [ ] Sale of assets during the year including shares, investments or your main residence
- [ ] Foreign Income
- [ ] Rental Property Income - see Rental Property Checklist
- [ ] Life Assurance or friendly society bonuses
- [ ] Forestry management investment income
- [ ] Discounts on employee shares
- [ ] Royalties, scholarships or other income
- [ ] Motor Vehicle use for work purposes
- [ ] Motor Vehicle Log Book for work purposes
- [ ] Work related travel - parking, tolls, train, taxi - Diary or itinerary and receipts
- [ ] Protective, occupation specific, non compulsory uniform
- [ ] Drycleaning of uniform
- [ ] Work related courses at an educational institution - student union fees, stationery, parking, travel
- [ ] Course fees (excluding HELP)
- [ ] Seminars or courses
- [ ] Trade or First Aid Certificates
- [ ] Work related home phone or mobile phone usage
- [ ] Home Office - hours per week, internet, phone, stationery etc
- [ ] Work related tools and equipment - description, date of purchase, amount
- [ ] Subscriptions, memberships, union fees, registrations
- [ ] Dividend and Interest deductions - eg loan interest
- [ ] Sun Protection
- [ ] Donations
- [ ] Tax Return Fees - previous year
- [ ] Personal super contributions
- [ ] Personal super contributions on behalf of your spouse
- [ ] Income Protection / Sickness & Accident Insurance
- [ ] Dependents - including parents, siblings, in laws, invalid or carer for an invalid
- [ ] Private Health Insurance statement
- [ ] Did you work in a remote area or served overseas with Defence Force - location & dates
- [ ] Did you claim zone rebate last year?
- [ ] Are you exempt from Medicare?
- [ ] Did you work for the full financial year?
- [ ] Out of pocket medical expenses
- [ ] HECS/HELP or Supplementary Student Loan
- [ ] Child support you paid