

# TAX RETURN CHECKLIST



## INCOME - Please provide evidence

- |   |  |
|---|--|
| <input type="checkbox"/> PAYG Payment Summary   | <input type="checkbox"/> Share dividend statements   |
| <input type="checkbox"/> Employment termination payments  | <input type="checkbox"/> New capital gains (shares, properties, cryptocurrency, etc)                       |
| <input type="checkbox"/> Australian government allowances like Newstart, youth allowance, Austudy, and Jobkeeper payments | <input type="checkbox"/> Rental properties income and expenses   |
| <input type="checkbox"/> Australian Government pensions and allowances  | <input type="checkbox"/> Business income and expenses  |
| <input type="checkbox"/> Australian annuities and superannuation income streams   | <input type="checkbox"/> Foreign source income (including foreign pensions) and foreign assets or property |
| <input type="checkbox"/> Australian Superannuation lump sum payments  | <input type="checkbox"/> Spouse taxable and exempt income  |
| <input type="checkbox"/> Gross Interest   |  |

## OTHER RELEVANT INFORMATION

- ☐ Property, shares, cryptocurrency (purchase and sale details)
- ☐ Do you have a HECS/HELP liability or a student supplement loan (e.g., SFSS) debt

## DEDUCTIONS - Please provide evidence

### Work-related car expenses

- ☐ Logbook method - vehicle expenses
- ☐ Km method - work kilometres travelled

### Work-related travel expenses

- ☐ Domestic or Overseas travel
- ☐ Other work-related travel expenses, e.g., borrowed car

### Work-related, occupation-specific or protective clothing

- ☐ Protective clothing
- ☐ Occupation specific clothing
- ☐ Laundry (up to \$150 without receipts)
- ☐ Dry cleaning
- ☐ Other claims - mending/repairs, sunglasses, etc (please specify)

### Work-related self-education expenses

- ☐ Course fees
- ☐ Books, stationery
- ☐ Travel

### Other work-related expenses

- ☐ Home office expenses
- ☐ Computer and software
- ☐ Telephone/mobile phone
- ☐ Tools and equipment
- ☐ Subscriptions, journals and union fees
- ☐ Depreciation
- ☐ Seminars and courses
- ☐ Any other work deductions

### Other types of deductions

- ☐ Gifts or donations
- ☐ Cost of managing tax affairs
- ☐ Other deductions (please specify)
- ☐ Income protection insurance

**Feel free to call us on 08 9305 1000 if you have any questions.  
We look forward to seeing you at your appointment.**