



Tax Return Checklist

Item Income:

- PAYG Payment Summaries (Group Certificates)
- Allowance, Tips, Directors Fees etc
- Employer Lump Sum Payments Termination Payments
- Government Allowances - Youth Allowance, Job Seeker, Austudy,
- Government pensions & Allowances
- Superannuation and Annuities
- Interest Received
- Dividends
- Employee Share Scheme
- Managed funds or trust income
- Rental from a property
- Capital Gains from the sale of assets
- Crypto
- Any other income

Business:

- Business Income
- Job Keeper, ATO Boost, other grants

Expenses:

- Work Related Car Expenses (Diary or Logbook)
- Work Related Travel Expenses
- Uniform or protective clothing
- Work related self-education (note first \$250 not claimable)
- Other work-related expenses
- Union Fees
- Books and work-related expenses
- Sun protection
- Covid - Face masks, Sanitizer & test kits
- Stationery
- Home office
- Tools
- Phone Calls
- Memberships and Subscriptions
- Interest expenses
- Dividend expenses
- Gifts of Donations
- Cost of managing tax affairs
- Travel to tax agent
- Super Contributions
- Income Protection Insurance

Offsets:

- Seniors and pensioners (Includes self funded retirees)
- Australian superannuation income stream
- Zone Offset - Did you live in a remote zone?
- Do you maintain an invalid dependent or carer?

Other:

- Spouse Date of Birth and Income
- Private Health Insurance Statement
- Residency/ Working Holiday maker
- Help / TSL / SFSL

Notes: