

Tax Return Checklist

Income:

- PAYG Payment Summaries (Group Certificates)
- Employer Lump Sum Payments Termination Payments
- Government Allowances or Pensions
- Superannuation and Annuities
- Business Income
- Interest Received
- Dividends
- Employee Share Scheme
- Managed funds or trust income
- Rental from a property
- Capital Gains from the sale of assets
- Any other income

Expenses:

- Work Related Travel Expenses
- Work Related Car Expenses (Diary or Logbook)
- Uniform or protective clothing
- Work related self-education (note first \$250 not claimable)
- Other work related expenses
- Union Fees
- Books and work related expenses
- 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
- Income Protection Insurance

Others:

- Spouse Date of Birth and Income
- Did you live in a remote zone?
- Do you maintain an invalid dependant or carer?
- Private Health Insurance Statement
- Copy of Drivers Licence