

CHECKLIST - PERSONAL INCOME TAX RETURN

Item/Detail	Yes	No	N/A
1. Salaries and Wages - PAYG Payment Summaries/ Pension/ Unemployment Certificates/ Centrelink Payment Summary. Where you haven't received a payment summary please advise details of employment.			
2. Eligible Termination Payment Summary/ Rollover Notification Forms.			
3. Details of interest received, bank, branch and account number & TFN withheld.			
4. Details of dividend income, imputation credits and TFN withheld			
5. Details of Employee Share schemes and associated ESS Payment Forms			
6. Partnership income or Trust distributions, public or private. Managed Investment Statements and associated tax information guides.			
7. Disposal of any assets including shares for capital gains tax purposes (date of disposal, sale price, date of purchase & cost price). Copy of purchase/sale contract and settlement statement.			
8. Foreign Pension and Foreign Income.			
9. Rental Properties – Agent Statements, details of income & expenses, loan statements, depreciation and capital allowance schedules and Purchase / Sale contracts and Settlement Statements.			
10. Any other income from any source.			
11. PAYG Tax Deduction Forms (under Voluntary Deduction Agreements)			
12. Motor Vehicle Expenses – Log books , diary entries regarding kilometers, expenses, purchase contract and HP/Chattel Mortgage contract.			
13. Copies of receipts for self-education expenses together with details of kilometers travelled & HELP notices.			
14. Copies of receipts for work-related expenses. To claim a work-related deduction: you must have spent the money yourself and			

<p>weren't reimbursed. it must directly relate to earning your income. you must have a record to prove it.</p>			
<p>15. Subscriptions or Professional Association fees.</p>			
<p>16. Working from home during COVID-19.</p> <p>Due to COVID-19 your working arrangements may have changed. If your working arrangements have changed please advise your situation so we can discuss additional claims.</p>			
<p>17. Gifts and Donations (note: charity raffle tickets are non-deductible).</p>			
<p>18. <u>Superannuation Contributions – Tax Deductions</u> You can <u>only</u> claim a deduction for personal contributions you made to a complying superannuation fund if:</p> <ul style="list-style-type: none"> • You have lodged a notice of intent to claim a deduction for personal superannuation contributions; • You have received an acknowledgement from your superannuation fund. 			
<p>19. Income Protection Insurance statement.</p>			
<p>20. Name of all dependent spouse and children including dates of birth, income level, status, and place of residence</p>			
<p>21. Spouse Super Contributions - Contributions made on behalf of a taxpayer's non-working (or low income earning) spouse can gain a rebate of up to \$540 (i.e. 18% on maximum contributions of \$3,000). Spouse's assessable income cannot exceed \$40,000. Provide details of amount contributed and Fund Statement.</p>			
<p>22. Private Health Insurance Annual Statement. – Surcharges apply if above income thresholds. This should be reported to the ATO but please advise health details for review.</p>			