



Individual tax
return
documentation
checklist



This checklist is designed to help you compile all relevant documentation for your tax return appointment.

Income ✓

Employment income	<input type="radio"/>
Centrelink/pension income	<input type="radio"/>
Employment termination payment (ETP)	<input type="radio"/>
Annuity & superannuation income stream statements/lump sum payments	<input type="radio"/>
Bonuses from life companies and friendly societies	<input type="radio"/>
Interest earned	<input type="radio"/>
Dividends statements	<input type="radio"/>
Trust distribution and capital gains statements	<input type="radio"/>
Foreign source income	<input type="radio"/>
Business income	<input type="radio"/>
Employee share scheme statements	<input type="radio"/>

Tax deductions ✓

Work related motor vehicle expenses (make & model required, log book may be required)	<input type="radio"/>
Work related travel expenses (eg tolls, accommodation, meals)	<input type="radio"/>
Work related clothing & laundry expenses	<input type="radio"/>



Tax deductions continued ✓

Work related self-education expenses	<input type="radio"/>
Dividend & interest deductions	<input type="radio"/>
Tax deductible gifts & donations	<input type="radio"/>
Income protection insurance	<input type="radio"/>
Union fees	<input type="radio"/>
Home office expenses	<input type="radio"/>
Seminars	<input type="radio"/>
Overtime meals	<input type="radio"/>
Tools & equipment	<input type="radio"/>
Computer, internet & software expenses	<input type="radio"/>
Memberships & subscriptions	<input type="radio"/>
Telephone and mobile phone	<input type="radio"/>
Sun protection receipts	<input type="radio"/>
Personal superannuation contributions & Notice of Intent to Claim	<input type="radio"/>

Other useful information ✓

Child Support Agency payments	<input type="radio"/>
Private health insurance statement	<input type="radio"/>
Dependants - name, DOB	<input type="radio"/>



Other useful information continued



Zone - if living in a remote area (dates)



Spouse contributions to superannuation



Investment property information



Annual rental agent statement



Rental income



Advertising for tenants



Bank loan statements (for interest & charges)



Body corporate levies



Cleaning



Council & water rates



Gardening & lawn mowing



Insurance



Land tax



Pest Control



Property management fees/commission



Repairs & maintenance



Stationery, telephone & postage



Replacements & improvements





For new investment properties		✓
Date the property was first available to rent		<input type="radio"/>
Date the property was built		<input type="radio"/>
Depreciable items (eg air conditioning, hot water system, stove)		<input type="radio"/>
Quantity surveyor report		<input type="radio"/>
Settlement statements, contracts, legals from purchase		<input type="radio"/>
Capital acquisitions & disposals		✓
Annual tax statements		<input type="radio"/>
Buy & sell details of shares/crypto (reports from trading platforms)		<input type="radio"/>
New clients		✓
Tax file number		<input type="radio"/>
Basic contact details		<input type="radio"/>
Last year's Income Tax Assessment		<input type="radio"/>
Last year's tax return		<input type="radio"/>
Previous year's accounting fees		<input type="radio"/>
Bank account details (bank account name, number and BSB)		<input type="radio"/>