

Individual Tax Return Checklist

Tick the box beside the items that apply to you

Client Name:

Income	Investment Property continued
Foreign sourced income	Date when property was purchased
Partnership distribution/s	Settlement statement/s
Personal services income (PSI)	Purchase/sale contracts
Capital gains tax statements (details of assets sold)	Private use portion (if applicable)
Employee Share Schemes (ESS)	Body corporate fees
Lump sum payments (e.g. eligible termination)	Council rates
Superannuation pension payment summaries	Details of when property was rented, including any rental or Agents statements
Trust distribution statements	Employment Related Deductions
Tax statements from fund managers	Motor vehicle expenses:
Interest income	a. Current log book percentage and
Share dividend statements	b. Running costs for the year or
Tax statements from financial advisors	c. Total work related km travelled
Income Statement from MyGov (Wages)	Work-related travel expenses
Government Allowances (e.g., Newstart)	Work-related clothing/laundry
Main occupation/title:	Work-related telephone calls
	Work-related internet
	Subscriptions, union fees or professional memberships
Other Income:	Do you work from home? If so, please provide average number of hours per week
	Books, journals or professional library expenses
Investment Property	Other Income:
Rental income	
Land tax	
Cleaning and general maintenance expenses	Other Deductions
Water charges	Superannuation
Borrowing expenses	Gifts/donations to charity
Agent/advertising fees	Deductible amount for pension/annuities
Gardening/lawn mowing fees	Purchase or repair of equipment used for work
Insurance premiums paid	Finance statements on deductible borrowings
Capital costs	Income protection premiums
Interest on loans	Self-education expenses (e.g. books, computer costs, car

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Investment related items	Offsets	
Interest/fees on borrowing for investments	Superannuation pension rebates	
Asset purchase/sale contracts and settlement statements	Private health insurance statement	
Buy/sell statements		
Have you have invested in any Cryptocurrency? Please Provide details of holdings/trades		
For new clients		
Last year's tax return:		
Last year's accounting fees:		
Children's names and DOB:		
Bank account details (in case of refund)		
Account Name:		
BSB: Account Number:		
Personal details (only fill out if your personal details have changed):		
Phone Number:		
Email:		
Address:		
Number of Dependent Children:		
Additional Notes:		