

Tax return document checklist

INCOME - Please provide evidence

- ☐ Wages & PAYG withheld – confirm details have been reported correctly on MyGov.
- ☐ Employment termination payments.
- ☐ Australian government allowances – for example Jobseeker, Youth Allowance, Parenting Payments, Austudy, and Pandemic Disaster Leave payments.
- ☐ Bank interest earned.
- ☐ Share dividend statements.
- ☐ Managed fund annual tax statements.
- ☐ Employee share scheme tax statement
- ☐ Rental property income and expenses.
- ☐ Business income and expenses.
- ☐ Capital gains/losses - Property, shares & investments, cryptocurrency, collectable assets. (Purchase and sale details)
- ☐ Distributions from partnerships / trusts / deceased estates which we are not the tax agent for
- ☐ Australian annuities, superannuation income streams or superannuation lump sum payments.
- ☐ Foreign source income (including foreign pensions), foreign assets and property.

Other relevant information

- ☐ Spouses taxable and exempt income totals.
- ☐ Number of dependents at 30th June (children living with you under the age of 21 or 21-24 and in full time education).
- ☐ Medicare levy exemption statement (if applicable)
- ☐ Zone tax offset – dates residing in remote area during the year (if applicable) – note, does not include FIFO work
- ☐ Do you have a HECS/HELP liability or a student supplement loan.

DEDUCTIONS - Please provide evidence

Work-related car expenses

- ☐ Logbook method – Logbook % and annual vehicle running costs (fuel, rego & insurance, servicing & repairs, car loan interest etc)
- ☐ Cents per KM method – KM's done for on-job travel

Work-related travel expenses

- ☐ Domestic or overseas travel overnight for work.
- ☐ Airfares, accommodation etc.
- ☐ Meal costs if no per diem provided by employer
- ☐ Transport costs (e.g., Hire car, public transport, taxis & uber etc).

Work-related, occupation-specific or protective clothing

- ☐ Laundry expenses
- ☐ Protective clothing costs
- ☐ Occupation specific clothing
- ☐ Dry cleaning
- ☐ Sun protection items (sunscreen, sunglasses, hats etc)
- ☐ Other uniform claims – repairs & alterations etc (please specify)

Work-related self-education expenses

- ☐ Course fees (not including HECS-HELP courses)
- ☐ Books, stationery, consumables etc

Other work-related expenses

- ☐ Home office expenses
- ☐ Computer and software costs
- ☐ Telephone/mobile phone/home internet
- ☐ Tools and equipment
- ☐ Subscriptions, journals and union fees
- ☐ Courses, seminars and workshops
- ☐ Printing, stationery, office expenses
- ☐ Parking (not at normal workplace)
- ☐ Any other work-related costs

Other deductions

- ☐ Gifts or donations to deductible gift recipients
- ☐ Cost of managing tax affairs
- ☐ Income protection insurance
- ☐ Additional superannuation contributions
- ☐ Investment deductions (interest, fees, subscriptions relating to shares, managed funds etc)
- ☐ Other deductions (please specify)

Please call us on 08 9381 2555 if you have any questions.