



Tax Return Checklist

Income

- Payment Summaries (Group Certificates)
- Centrelink or Government Payments (Eg Newstart, Austudy, Pensions)
- Superannuation Pensions or Payments
- Bank Interest
- Share Dividends
- Managed Funds or other investments
- Rental Property Income
- Capital gains from sale of shares or property (please provide contract purchase date, purchase price, contract sale date and sale price)
- Self-employment income/business income

Deductions

Work Related

- Use of your own vehicle – kilometres travelled, make and model
- Interstate/overseas travel
- Uniforms/protective clothing
- Self-education expenses
- Computer or internet usage
- Mobile Phone
- Tools, seminars, reference books
- Union Fees, professional associations

General

- Charitable Donations
- Last year's tax agent fee
- Income protection insurance
- Investment related deductions
- Self-employment deductions
- Personal superannuation contributions

Other

- Copy of your prior year tax return.
- Tax File Number
- Bank Account Details
- Private Health Insurance Details
- Spouse Name, Taxable Income, Date of birth
- HECS/HELP or Student Supplement Loans
- Commonwealth or ATO Liabilities