

Individual Tax Return Checklist

Income

- *PAYG Payment Summaries (Please also include your occupation details.)**
- Allowances, earnings, tips, director's fees etc
- Eligible Termination Payment Summaries
- Centrelink / Pension / Veterans Affairs Payment Summaries
- Other Australian Pensions or Annuities including Superannuation Pensions Gross
- Interest Received
- Dividends received
- Trust Distributions / Investment Income
- Rental Property Income (including agent's annual statement)
- Business Income
- Foreign Sourced Income
- Contract note for shares bought or sold (including shares acquired under an employee share scheme)
Details of properties bought or sold

Expenses

- Work related Motor Vehicle Expenses
- Work Related Travel Expenses
- Purchases of Work Related equipment including computers, tools, etc.
- Work Related Uniforms/Protective Clothing - Purchases/Laundry Work
- Related self-education expenses
- Gifts or Donations
- Personal Superannuation Contributions Income
- Protection Insurance premium
- Interest and Dividend Deductions (including interest/fees on borrowing for investment purposes)
- Rental Property expenses (which may include advertising fees, agent fees, Body corporate fees, Borrowing expenses, Capital costs, Cleaning and general maintenance expenses, Council rates, Interest on loans, Insurance premiums paid, Land tax details, Water charges, details of when the property were purchased and acquisition amount)
- Business Expense

Other Information

- Private Health Insurance Tax Statement Spouse's
- Taxable Income
- Details of any child support you paid
- Copy of your Photo ID showing DOB and current address
- *Last year's tax return or your TFN**
- *BSB, Account Number, and Account Name for any tax refund deposited**

* Items are compulsory for tax return.

✓ Tick the box beside the items that apply to you. And don't forget to provide us all those information. **Don't worry if you aren't sure about any of the items** – contact One Minute Tax via phone call or email or make an appointment now!

 MAKE AN APPOINTMENT