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# INDIVIDUAL TAX RETURN CHECKLIST

Clients often ask us: What information do I need to bring for you to complete my income tax return? Here is a list of items that you need to review to complete your tax return (not all items will of course apply to all tax payers):

### Income:

- PAYG Payment Summaries from employment, previously called Group Certificates
- PAYG Payment Summaries from Centrelink
- Statements from Pension or Annuity providers
- ETP Payment summaries if you have changed jobs or were made redundant
- Did you earn interest in savings accounts or term deposits?
- Did you receive any dividends from shares, including dividend reinvestments
- Did you receive any income from a managed fund, check with your fund manager
- Did you own an investment property, residential or commercial?
- Did you operate a business as a sole trader or partnership?
- Did you receive any income from another country, ie foreign pension, interest etc

### Expenses:

- Any receipts you have for work related expenses
- If you have used your motor vehicle for work, details of vehicle and work travel, ie logbook, receipts etc
- Records of any donations made to charities, school building levies
- Fees charged for prior year tax return
- If you borrowed money for shares or other investments, interest and fees charged
- Income protection insurance for loss of wages

### Other:

- Did you buy or sell and shares or other assets?
- Private health insurance details
- Did you have more than \$2000 in out of pocket expenses for medical treatments, you can combine the out of pocket expenses for your immediate family, ie spouse and children
- Spouse details
- HELP and/or SFSS loan details

*Important: The information provided on this information sheet is not advice. Clients should not act solely on the basis of the material contained on this information sheet. Items herein are general comments only and do not constitute or convey advice per se. Also changes in legislation may occur quickly. We therefore recommend that our formal advice be sought before acting in any of the areas. This information sheet is published as a helpful guide to taxpayers and for their private information.*