



## INCOME TAX RETURN CHECKLIST – INDIVIDUALS

*Please use this checklist to prepare and attach the relevant information needed for your online lodgement*

### INCOME

- Payment Summaries
- Lump Sum and Termination Payment Summaries
- Government Payment statements, if received
- Interest income from banks and building societies
- Dividend statements from dividends received or reinvested
- Annual Tax Statements from Managed Funds
- Other income:
  - Rental properties
  - Business
  - Foreign income
  - Capital gains
  - Employee share schemes

### DEDUCTIONS

- Work related expenses:
  - Motor vehicle
  - Travel (fares and accommodation)
  - Uniforms/work-wear
  - Self-education and professional development
  - Union, registrations, tools, subscriptions, memberships
  - Home office, seminars, conferences
  - Telephone, computer, internet
  - Any other costs incurred earning income
  - Donations to charities or building funds

### OFFSETS & REFUNDS

- Health insurance and rebate entitlement statement
- IAS statements or details of PAYG instalments paid
- Spouse details including taxable and exempt income

**TAX REFUNDS** – the Tax Office no longer issues refunds by cheque so you will have to provide your bank account details, including the BSB and Account Number