



TAX EDGE
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Income Tax Return Checklist – Individuals

INCOME

- ☐ Payment Summaries
- ☐ Lump Sum & Termination Payment Summaries
- ☐ Interest earned on bank accounts
- ☐ Dividend statements
- ☐ Annual tax statement from Managed funds
- ☐ Other Income:
 - ☐ Employee share scheme
 - ☐ Capital gains
 - ☐ Foreign income
 - ☐ Rental Property (Rental Property Questionnaire)
 - ☐ Business

DEDUCTIONS

- ☐ Work related expenses:
 - ☐ Motor vehicle (Log Book/Cents per KM Questionnaire)
 - ☐ Domestic and Overseas Travel Questionnaire
 - ☐ Clothing, Uniforms and Laundry Questionnaire
 - ☐ Self-education Questionnaire
 - ☐ Union fees/Registrations/Subscriptions/Memberships Questionnaire
 - ☐ Tools and Equipment Questionnaire
 - ☐ Telephone and Internet Questionnaire
 - ☐ Home office Questionnaire
 - ☐ Overtime Meal Allowance Expense Declaration
 - ☐ Any other work-related expenses
- ☐ Gifts and Donations Questionnaire
- ☐ Tax agent fees
- ☐ Income protection insurance
- ☐ Notice of Intent to Claim or Vary a Deduction for Personal Super Contributions
- ☐ Interest/Expenses related to investment activities

OTHER INFORMATION

- ☐ Private health insurance statement
- ☐ Spouse details including taxable and exempt income