



Tax Prep Checklist

This is a generic checklist to help collate the information required to complete your tax return, please note that not all items may be applicable to you.

INCOME

- Ensure that your Employer has finalised Single Touch Payroll (for all wages including Employment Termination Payments)
- Superannuation Pension & Annuities Income
- Interest Income Summary (from Financial Institutions)
- Dividend Income
- Investment Property Rental Details
 - Income
 - Loan Interest
 - Expenses
 - Capital Works Expenditure
- Managed Investment Trust Income
 - Cash Management Trust
 - Money Market Trust
 - Mortgage Trust
 - Unit Trust
 - Managed Fund
- Capital Gains (Purchase & Sale Details of Sold Assets including both Shares & Property)
- Partnership & Trust Income (Partner or Beneficiary)
- Any Other Income
 - Compensation & Insurance Payments
 - Discounts on Shares or Rights Received Under an Employee Share Scheme
 - Lump Sum Payments in Arrears
 - Foreign Exchange Gains
 - Royalties
 - Jury Service Fees

TAX OFFSETS

- Zone & Overseas Forces (Let us know if you lived in a remote area for more than 181 days)

EXPECTING A REFUND?

Don't forget to provide us with your bank account details!

DEDUCTIONS

- Work Related Car Expenses
 - Number of kms driven OR Logbook with Service & Repair Costs, Registration & Insurance Costs, Engine Capacity)
- Work Related Travel Expenses
 - Number of Nights Away & Where
 - Accommodation Costs
 - Meal Costs
 - Diary for Overseas Travel
- Work Related Uniform Expenses
 - Protective Clothing & Safety Footwear
 - Compulsory Clothing
 - Occupational-Specific Clothing
 - Laundry & Dry Cleaning Costs
- Work Related Self-Education Expenses
 - Course Expenses
 - Depreciating Assets
 - Car Expenses
 - Travel Expenses
 - Student Union Fees
 - Books
 - Stationery
 - Tools & Equipment
 - Consumables
- Other Work-Related Expenses
 - Income Protection or Sickness & Accident Insurance
 - Union Fees
 - Seminars
 - Overtime Meals
 - Home Office Expenses (inc hours worked, furniture, phone, internet, computer consumables, stationery)
 - Tools & Equipment
- Any Other Deductions
 - Cost of Managing Tax Affairs
 - Gifts & Donations
 - Personal Super Contributions (not made by your Employer)
- Interest, Dividend & Other Investment Income Deductions (inc Investment Advisor Fees)