

# 2019-20 Individual Tax Return Checklist

## 2019-20 Individual Tax Return Checklist

Name of taxpayer: \_\_\_\_\_

Address: \_\_\_\_\_

Preferred Contact No: \_\_\_\_\_

Information	Information Provided	Not Applicable
<b>Income</b>		
PAYG payment summaries (eg from employers)		
Lump sum payments (eg Employment Termination Payment)		
Partnership distribution statement, including copy of partnership's tax return		
Trust distribution statement, including copy of trust's tax return		
Documentation of foreign source income, foreign assets or property		
Bank statements stating interest earned, including term deposits		
Dividend statements		
Employee share scheme statements		
Managed fund annual tax statement and capital gains tax statement		
Buy/sell contract notes for shares (if any shares were sold)		
<b>Work-related Deductions</b>		
Details of depreciable assets bought during the year (eg laptops)		
Details and receipts for home office expenses		
Professional journals / trade magazines		
Professional memberships / subscriptions		
Receipts for continuing professional development courses and seminars		
Receipts for self-education expenses		
Receipts for other work-related deductions such as protective clothing, uniform expenses, tools and equipment, and travel		
Vehicle logbook for motor vehicle expenses (if using the logbook method)		
<b>Other Deductions</b>		
Receipts for donations of \$2 and over to deductible gift recipients		
Expenditure incurred in managing tax affairs (eg tax agent's fees)		
Expenditure incurred in earning interest, dividend and other investment income (eg investment advice fees)		
Income protection insurance premiums		
<b>Rental Properties</b>		
Date when property was purchased, including details of any co-ownership		
Period property was rented out during the income year		

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Records detailing rental income (annual statement from property agent, if engaging services of an agent)		
Loan statements for property showing interest paid for the income year		
Expenses incurred such as water charges, land tax and insurance premiums		
Details of depreciable assets bought or disposed of during the year		
Details of any capital works on the property		
If the property was disposed of during the income year, information relating to dates and costs associated with the disposal of the property		
<b>Offsets / Rebates</b>		
Details of any superannuation contributions for spouse		
Details of dependants, including their age, occupation and income		
Private health insurance statement (including details of prepaid premiums)		
<b>If Operating as a Sole Trader</b>		
Cashbook, which includes records of drawings taken before the business takings were banked		
Copies of Business Activity Statements lodged		
Copies of pay-as-you-go (PAYG) summaries for employees		
Details of any Government grants, rebates or payments received		
Details of superannuation contributions for employees		
Details of any assets purchased, including date of purchase and amount		
Payment of salaries and superannuation to associates		
Records from accounting software (eg trial balance, profit & loss and balance sheet)		
Statements of all liabilities of the business		
Notice of superannuation contributions for self-employed persons		
<b>Other Information</b>		
Copies of Instalment Activity Statements lodged		
Any other information that you think is relevant		