

# Individual Tax Return Checklist

Complete this checklist to gather the necessary documents for your tax return.

PERSONAL INFO		✓
<b>Current personal details</b> including any changes: <ul style="list-style-type: none"> <li>o Tax File Number (TFN)</li> <li>o Full name, address and contact details</li> <li>o Bank account (Name, BSB, Acc Number)</li> </ul>		
<b>Private Health Insurance Statement</b> (if lodging before mid-August)		
<b>Spouse's taxable income and DOB</b> (if not engaging SATS Perth)		
INCOME		✓
<b>Income Statements or Payment Summaries:</b> <ul style="list-style-type: none"> <li>o Wages/Salaries</li> <li>o Employee Termination Payments (ETP)</li> <li>o Pensions (domestic or international)</li> <li>o Lump-sum payments</li> <li>o Centrelink payments or allowances</li> <li>o Any other income streams</li> </ul>		
<b>Interest &amp; Dividends Statements</b>		
<b>Managed Fund Statements</b> or similar investments (Cash Management, Trusts, other)		
<b>Asset Sales &amp; Purchase Documents</b> <ul style="list-style-type: none"> <li>o Shares</li> <li>o Cryptocurrencies</li> <li>o Overseas Assets</li> <li>o Collectables</li> <li>o Options</li> <li>o Land</li> <li>o Rental Property</li> </ul>		
<b>Rental property income</b> (please refer to our <i>Rental Property Tax Checklist</i> )		
<b>Business income</b> (please refer to our <i>Business Owners Tax Checklist</i> )		
<b>Income from international sources</b> (e.g. pensions, interest, dividends, rent, other)		
<b>Any other income received</b>		

EXPENSES		✓
<b>Work related* motor vehicle expenses</b> including: <ul style="list-style-type: none"> <li>o Work related kms (refer to logbook)</li> <li>o Car expense receipts</li> </ul>		
<b>Purchase of a new motor vehicle</b> including: <ul style="list-style-type: none"> <li>o Dealer invoice</li> <li>o Loan Contract (if financed)</li> <li>o Logbook</li> </ul>		
<b>Work related* travel expenses**:</b> <ul style="list-style-type: none"> <li>o Airfares</li> <li>o Car Hire / Taxis / Trains / Buses / Tolls</li> <li>o Parking</li> <li>o Accomodation</li> <li>o Meals</li> </ul>		
<b>Work related* clothing and laundry expenses**:</b> <ul style="list-style-type: none"> <li>o Uniform</li> <li>o Work Boots</li> <li>o Sun Protection Products</li> <li>o Protective Clothing</li> <li>o Dry Cleaning</li> </ul>		
<b>Work related* education expenses**:</b> <ul style="list-style-type: none"> <li>o Course Fees</li> <li>o Textbooks</li> <li>o Student Union Fees</li> <li>o Stationery</li> <li>o Home Office Expenses</li> </ul>		
<b>Other work related* expenses**:</b> <ul style="list-style-type: none"> <li>o Home Office Expenses</li> <li>o Computer / Laptop / Tablet &amp; Software</li> <li>o Phone</li> <li>o Tools, Equipment &amp; Repairs</li> <li>o Professional fees</li> <li>o Safety equipment</li> <li>o Union fees</li> <li>o Professional Development (including conferences, seminars, subscriptions)</li> <li>o Insurance</li> <li>o Stationery</li> </ul>		
<b>Rental property expenses</b> (please refer to our <i>Rental Property Tax Checklist</i> )		
<b>Business expenses</b> (please refer to our <i>Business Owners Tax Checklist</i> )		
<b>Interest &amp; Dividend deductions</b> (interest on loans and other expenses from investments)		
<b>Gifts &amp; Donations</b> over \$2 to registered charities or school building funds. Receipts are essential.		
<b>Expenses for managing taxes</b>		

\* if total work expenses exceed \$300 (excluding car & some travel expenses) receipts are generally needed to prove the full amount.

\*\* you cannot claim this if the cost was paid for or reimbursed by your Employer.