



Individual Income Tax Return Checklist

GENERAL

- Spouse Details:
 - Name
 - Date of birth
 - Taxable income
 - Copy of tax return (if not completed by our office)
- Dependent children details:
 - Name
 - Date of birth
 - Taxable income
- Bank account details for tax refund (if applicable):
 - BSB number
 - Account number
 - Account name
- Private health insurance tax statement
- Copy of last year's income tax return (we will have this on file if completed by our office)

INCOME

- PAYG payment summaries (group certificates)
- Lump sum and termination payment summaries
- Government payment statements (e.g. Centrelink)
- Interest income from bank accounts
- Dividend statements
- Annual tax statements for managed funds
- Foreign income
- Employee share schemes

EXPENSES

- Work related expenses - ATO industry guides @ www.griffinassociates.com.au/resources/links-employee-guides
 - Motor vehicle expenses:
 - Logbook, or
 - Estimate of kilometres (maximum of 5,000kms)
 - Travel expenses
 - Uniforms (protective clothing and compulsory work uniform)
 - Self education and professional development
 - Other work related expenses:
 - Union fees
 - Registrations, subscriptions and memberships
 - Tools and equipment
 - Telephone and internet work usage
 - Home office expenses
- Donations to charities or building funds
- Cost of managing tax affairs (e.g. prior year tax agent fee)
- Income protection insurance tax statement
- Investment expenses (e.g. interest to loan to purchase shares)

OTHER

- Rental property – Refer to rental property checklist
- Capital gain – Refer to capital gain checklist
- Business schedule – Refer to business schedule checklist

SUBSTANTIATION DETAILS

- In the event of an audit, the ATO may request receipts for claimed expenses. The receipt should include the following:
 - Date and name of supplier
 - Item purchased
 - Amount paid for the item
- Receipts and vehicle log books should be maintained for 5 years
- Please note that private use may need to be apportioned