



Income Tax Return Checklist – Individuals

Please use this checklist and bring any relevant information with you as we cannot be sure when the Australian Tax Office Portal will have these details available.

INCOME

- Please check your income statement is finalised through 'My Gov'
- Interest income statements from banks and building societies where visiting us in July
- Dividend statements for dividends received or reinvested
- Annual Tax Statements from Managed Funds and Trusts
- Other income:
 - Rental property statements, rates, interest & insurance
 - Business income and expenses
 - Foreign income
 - Capital gains - purchase and sale documents for any assets sold
 - Employee share schemes

DEDUCTIONS

- Work related expenses:
- Motor vehicle, logbook or record of kilometers
- Travel (fares and accommodation)
- Uniforms/work-wear
- Self-education and professional development
- Union, registrations, tools, subscriptions, memberships
- Home office, seminars, conferences. Home office logbook is required in 2023.
- Telephone, computer, Internet costs and % of use
- Any other costs incurred earning income
- Donations to charities or building funds
- Income protection insurance receipt or letter of deduction
- Notice of intent for any Super Contributions you paid personally and wish to claim

OTHER ITEMS

- Health insurance - please check your statement has been issued if visiting us in July
- Spouse details including taxable and exempt income

The Tax Office no longer issues refunds by cheque so you must bring your bank account details, including the BSB and Account Number with you to your appointment.