

## 2023 Individual Tax Return Checklist

Income	✓
STP Income Statement information from your employer	
Lump sum payments (e.g. Employment Termination Payment)	
Australian Government Allowances (e.g. Newstart, Youth Allowance, Parenting Payment)	
Australian Government Pensions (e.g. Age Pension, Carer Payment)	
Annual Tax Statement and Capital Gains Tax Statement – Managed Investment Funds	
Partnership Distribution Statement	
Dividend Statements (usually issued twice a year)	
Interest earned from Savings Accounts and Term Deposits	
Capital Gains – Buy / Sell contracts for shares if sold this financial year	
Work-related Deductions	✓
Motor Vehicle details if you are using your personal vehicle for work purposes 1- Kilometres you have travel for work purposes for the year or 2- Copy of log book plus all motor vehicle expense for the year	
Work related travel costs (eg tolls, parking, domestic / international travel)	
Clothing for work - if you require a uniform or protective clothing	
Details of depreciable assets bought during the year (e.g. laptops / large tools)	
Self-education costs for continuing professional development courses and seminars	
Professional journals / magazines	
Professional memberships / subscriptions / union fees	
Tools that you used for work purposes	
Business use of personal phones / home internet	

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<b>Other Deductions</b>	✓
Receipts for donations of \$2 and over to registered charities	
Expenditure incurred in managing tax affairs (eg tax agent's fees)	
Expenditure incurred in earning investment income (eg interest)	
Income protection insurance premiums	
<b>Rental Properties</b>	✓
Annual statement from property agent (if engaging the services of a rental agent)	
Records detailing rental income (if not engaging the services of a rental agent)	
Details of depreciable assets bought or disposed during the year	
Expenses incurred, which are not detailed on the property agent annual statement, such as: water charges, council rates, repairs, land tax, body corporate and insurance premiums	
Loan statements for property showing interest paid for the income year	
If property is held by more than one individual, provide details of owners and their legal ownership percentage	
If property was disposed of during the income year, information relating to dates and costs associated with the acquisition and disposal of the property	
<b>Offsets / Rebates</b>	✓
Details of any superannuation contributions for spouse	
Private health insurance statement – This <b>MUST</b> be supplied	

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If you operate as a SOLE TRADER	✓
Business cashbook, trading income and expenses	
Copies of Business Activity Statements lodged x 4 quarters	
Copies of 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	
Payments you made for personal superannuation contributions	
Payments of salaries and superannuation to associates	

Other Information	✓
You <b>MUST</b> supply Banking details for any refunds to be directly deposited into by the ATO	
Copies of Instalment Activity Statements paid	
Details of any employee share scheme	
Foreign Income / Assets to be disclosed (eg interest / rent from overseas bank accounts and property)	
Are you a working holiday maker in Australia on a 417 or 462 working holiday visa	
Any other information that you think may be relevant	

If you have questions about any of the checklist items listed please just ask, we are more than happy to help!