

# 2019 Individual Tax Return Checklist

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

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

Preferred contact no.: \_\_\_\_\_

Information	Information provided	Not applicable
<b>Income</b>		
PAYG payment summaries or STP Income Statements from employers (via MyGov)	<input type="checkbox"/>	<input type="checkbox"/>
Lump sum payments (eg employment termination payment)	<input type="checkbox"/>	<input type="checkbox"/>
Partnership distribution statement, including copy of partnership tax return	<input type="checkbox"/>	<input type="checkbox"/>
Trust distribution statement, including copy of trust tax return	<input type="checkbox"/>	<input type="checkbox"/>
Documentation re foreign source income, foreign assets or property	<input type="checkbox"/>	<input type="checkbox"/>
Bank statements stating interest earned, including for term deposits	<input type="checkbox"/>	<input type="checkbox"/>
Dividend statements	<input type="checkbox"/>	<input type="checkbox"/>
Employee share scheme statements	<input type="checkbox"/>	<input type="checkbox"/>
Managed fund annual tax statement and capital gains tax statement	<input type="checkbox"/>	<input type="checkbox"/>
Buy/sell contract notes for any share transactions	<input type="checkbox"/>	<input type="checkbox"/>
<b>Work-related deductions</b>		
Details of depreciable assets bought during the year (eg laptops)	<input type="checkbox"/>	<input type="checkbox"/>
Details and receipts for home office expenses	<input type="checkbox"/>	<input type="checkbox"/>
Professional journals/trade magazines	<input type="checkbox"/>	<input type="checkbox"/>
Professional memberships/subscriptions	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for continuing professional development courses and seminars	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for self-education expenses	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for other work-related deductions such as protective clothing, uniform expenses, tools and equipment, and travel	<input type="checkbox"/>	<input type="checkbox"/>
Vehicle logbook for motor vehicle expenses (if using the logbook method)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Other deductions</b>		
Receipts for donations of \$2 and over to deductible gift recipients	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in managing tax affairs (eg tax agent fees)	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in earning interest, dividend and other investment income (eg investment advice fees)	<input type="checkbox"/>	<input type="checkbox"/>
Income protection insurance premiums	<input type="checkbox"/>	<input type="checkbox"/>

Information	Information provided	Not applicable
<b>Rental properties</b>		
Date when property was purchased, including details of co-ownership if applicable	<input type="checkbox"/>	<input type="checkbox"/>
Period property was rented out during the income year	<input type="checkbox"/>	<input type="checkbox"/>
Records detailing rental income (annual statement from property agent, if engaging services of an agent)	<input type="checkbox"/>	<input type="checkbox"/>
Loan statements for property showing interest paid for the income year	<input type="checkbox"/>	<input type="checkbox"/>
Expenses incurred such as water charges, land tax and insurance premiums	<input type="checkbox"/>	<input type="checkbox"/>
Details of depreciable assets bought or disposed of during the year	<input type="checkbox"/>	<input type="checkbox"/>
Details of any capital works on the property	<input type="checkbox"/>	<input type="checkbox"/>
If the property was disposed of during the income year, information relating to dates and costs associated with the disposal of the property and sale proceeds	<input type="checkbox"/>	<input type="checkbox"/>
<b>Offsets/rebates</b>		
Details of any superannuation contributions for spouse	<input type="checkbox"/>	<input type="checkbox"/>
Details of dependants, including their age, occupation and income	<input type="checkbox"/>	<input type="checkbox"/>
Private health insurance statement (and details of prepaid premiums)	<input type="checkbox"/>	<input type="checkbox"/>
<b>If operating as a sole trader</b>		
Cashbook, which includes records of drawings taken before the business takings were banked	<input type="checkbox"/>	<input type="checkbox"/>
Copies of Business Activity Statements lodged	<input type="checkbox"/>	<input type="checkbox"/>
Copies of PAYG summaries for employees	<input type="checkbox"/>	<input type="checkbox"/>
Details of any government grants, rebates or payments received	<input type="checkbox"/>	<input type="checkbox"/>
Details of superannuation contributions for employees	<input type="checkbox"/>	<input type="checkbox"/>
Details of any assets purchased, including date of purchase and amount	<input type="checkbox"/>	<input type="checkbox"/>
Payments of salaries and superannuation to associates	<input type="checkbox"/>	<input type="checkbox"/>
Records from accounting software (eg trial balance, profit and loss, and balance sheet)	<input type="checkbox"/>	<input type="checkbox"/>
Statements of all liabilities of the business	<input type="checkbox"/>	<input type="checkbox"/>
Notice of superannuation contributions	<input type="checkbox"/>	<input type="checkbox"/>
<b>Other information</b>		
Copies of Instalment Activity Statements lodged	<input type="checkbox"/>	<input type="checkbox"/>
Any other information that you think is relevant	<input type="checkbox"/>	<input type="checkbox"/>