

2021 Individual Tax Return Checklist

Name of taxpayer: _____

Address: _____

Preferred contact no.: _____



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

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

A Tax Deduction is:-
An expense you have paid and have not been reimbursed for
Directly related to your income
You have proof of your expense (receipt or substantiation)