

Checklist for Individual Tax Return

Financial Year Ending 30th June _____

Client Name: _____

INCOME	N/A	Yes
Copy of ALL PAYMENT SUMMARIES		
Details of any Australian Government allowances or payments <i>(e.g. Newstart, youth allowance or Austudy)</i>		
Bank Interest Earnt		
Copies of ANY Dividend or Share Statements		
Details of any Employee Share Schemes (ESS)		
Investment Property Rental Statement		
Details of ANY Capital Assets Sold <i>(e.g. Investment Property, Shares or Your Home)</i>		
EXPENSES		
Work Related Car Expense Details <i>(e.g. business kms travelled, fuel, rego, insurance, maintenance, etc.)</i>		
Work Related Travel Expense Details		
Work Related Clothing or Uniform Expenses		
Work Related Self Education Expenses		
All Other Work Related Expenses <i>(e.g. Union fees, tools, phone expenses, seminars, subscriptions, professional memberships, overtime meals, etc.)</i>		
Gifts or Donations to Registered Charity Organisations		
Income Protection Insurance Paid		
All Investment Property Expenses Incurred <i>(e.g. council rates, water rates, interest, repairs and maintenance, agent fees, cleaning or rubbish removal, insurance premiums, etc.)</i>		

Notes or Additional Information:
