

**Individuals Tax Returns Checklist**

The list below contains items that are required to complete a tax return. Please note however that some items may not be relevant to your individual situation.

**Income:**

PAYG Payment Summaries (previously Group Certificates)

Payment Summaries for pensions or annuities

Payment Summaries from Centrelink ie newstart, pensions etc

Eligible termination payment statements

Interest earned from bank accounts, debentures etc

Share dividend statements

Annual Taxation Statements from Trust and managed investments, property and cash, management trust

Income and expenses from investment property(s)

Business income and expenses (self employed)

Foreign pensions

Capital Gains/Losses

Assets/shares buy and sell statements

**Expenses:**

A list of work related expenses

Motor vehicle log and expense receipts

Interest and fees on investment loans

Donations to charities

School building levies and library funds

Fee charged for previous year’s tax return

Income protection insurance and sickness and accident insurance

Superannuation contribution (self employed)

**Other:**

Private health insurance details/statement

Amount of HELP debt or Financial Supplement loans outstanding

Medical expenses if total out of pocket exceeds $2,060

Spouse date of birth and taxable income

Tax File Number (new clients only)

Mobile Number (new clients only)