

Income Tax Return Checklist – Individuals

The following checklist details some of the documents and information that we will ask you about when preparing your Income Tax Return. Please check the list and **bring any relevant information with you as we cannot be sure when the Australian Tax Office Portal will have these details available.**

Income

- Payment Summaries
- Lump Sum and Termination Payment Summaries
- Government payment statements, if received
- Interest income from banks and building societies
- Dividend statements for dividends received or reinvested
- Annual Tax Statements from Managed Funds
- Other income:
 - Rental properties
 - Business
 - Foreign income
 - Capital Gains
 - Employee Share Schemes

Appointment

Day: _____

Date: _____

Time: _____

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Deductions

- Work related expenses:
 - Motor vehicle
 - Travel (fares & accommodation)
 - Uniforms/work-wear
 - Self-education and professional development
 - Union, registrations, tools, subscriptions, memberships
 - Home office, seminars and conferences
 - Telephone, computer, internet
 - Any other costs incurred earning income
- Donations to charities or building funds
- Income protection insurance

Offsets and Refunds

- Health insurance and rebate entitlement statement
- IAS statements or details of PAYG instalments paid
- Spouse details including taxable and exempt income

Don't forget our fee for preparing your tax return is fully tax deductible.

Tax Refunds – the Tax office no longer issues refunds by cheque so you must bring your bank account details, including the **BSB and Account Number** with you to your appointment.

We can process your return without you having to travel to our office. You can email, post or fax your information to us along with your contact phone numbers and suitable times for us to contact you.