


TAXPAYER INFORMATION	
First Name	
Other given name(s)	
Surname	
Occupation	
TFN	
ABN (for sole traders)	
Children names & DOB	
Home Address	
Postal Address	
Phone	
Email	
Bank account (for tax refunds)	


INDIVIDUAL TAX RETURN CHECKLIST		
Income	Documentation required	Y/N
Wage or salary income	Income Statement/PAYG Payment Summary (if available)	
Lump Sum Payment / ETP	Income Statement/PAYG Payment Summary	
Partnership distribution	Partnership distribution statement, including copy of partnership's tax return	
Trust distribution	Trust distribution statement, including copy of trust's tax return	

Foreign income	Documentation re foreign source income, foreign assets or property	
Interest income	Bank statements stating interest earned, including for term deposits	
Dividend Income	Dividend statements	
Managed fund distribution	Managed fund annual tax statement and capital gains tax statement	
Employee share scheme income	Employee share scheme statements	
Capital gain/loss on disposal of shares or unit trust	Buy/sell certificates for shares.	
Cryptocurrency trading	Cryptocurrency Tax Statements	

Work-related deductions	Documentation required	Y/N
Assets or tools purchased	Details and receipts for tools & assets bought during the year & connection to employment	
Working-from-home expenses	Working-from-home diary, showing records of dates & times. Details & receipts of home office expenses.	
Professional journals & trade magazines	Details & receipts	
Memberships / subscriptions	Details & receipts	
Training / professional development / self-education	Details & receipts of expenses & connection to employment.	
Uniform / Protective clothing	Details & receipts of expenses & connection to employment.	
Work-related travel expenses	Details of work-related travel, log book for claims > 5,000km	

Other deductions	Documentation required	Y/N
Donations	Receipts for donations of \$2 and more to registered charities	

Other deductions	Documentation required	 Y/N
Tax agent fee	Receipt for preparation of prior year tax return / tax advice	
Expenditure incurred in earning interest, dividend and other investment income	Bank statement / investment report / tax invoice	
Income protection / sickness & accident insurance	Insurance premium statement. Note that premiums are not deductible if paid through super fund.	
Personal superannuation contributions	Proof of payment and notice of intent to claim deduction from super fund	

Rental properties	Documentation required	 Y/N
Date property purchased, details of ownership	Settlement statement from purchase	
Dates property rented out	Property manager statement (usually monthly, plus annual summary statement)	
Interest	Loan statements	
Council rates, water rates, land tax, home insurance, landlord insurance	Receipts / statements	
Strata / Owners Corporation levies	Details & receipts	
Assets purchased	Details & receipts	
Repairs & maintenance	Details & receipts	
Details of any capital works (construction/renovations) or additions made to the property	Details & receipts	
Property sale documentation	Settlement statement for purchase (if not previously provided) & sale, contract for sale, solicitor fees, agents commission, stamp duty and advertising, etc	

Offsets / Rebates	Documentation required	 Y/N
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Details of any superannuation contributions for spouse	Details of contributions made	
Spouse details	Spouse or Defacto partner's income, date of birth and full name	
Dependents	Details of dependants, including their age, occupation and income	
Private health insurance	Private Health Insurance statement showing premiums and names of insured family members	

Sole Trader	Documentation required	Y/N
Income & expenses	Cashbook Advisor access to Xero/MYOB ledger or P&L, Balance Sheet & trial balance.	
GST/PAYG	Copies of lodged Activity Statements	
Payroll	Summary of wages, PAYGW & super by employee	
Superannuation	Details of contributions made for employees	
Government grants, rebates or payments received	Details of any government grants, rebates or payments received	
Payments to associates	Details of any salary, super or payments made to associates.	
Assets & liabilities	Loan statements Car finance paperwork Statements for any other assets/liabilities of the business	
Superannuation contributions for business owner	Details of contributions made and copy of Intent to Claim form from super fund.	

Other Information (please add any other information which may be relevant to your income tax return)

