

## Individual tax return checklist

Following is a list of information we may require to prepare your tax return. The intent is to jog your memory for an item you may have forgotten. Please provide at your appointment or when you email/post your information to us.

### Income

- PAYG payment summary (formerly known as group certificate)
- Interest earned on bank accounts
- Centrelink PAYG payment summary
- Dividend statements & payments
- Managed fund end of year tax statement
  - Or wrap statements
- Partnership or trust distribution statement
- Foreign income
  - Foreign investment property
  - Foreign pension income
  - Any other foreign income
- Superannuation income stream PAYG payment summary
- Superannuation lump sum PAYG payment summary
- Employment termination payments
- Rental information – See the **rental checklist** under the “Checklist” tab at [www.btatax.com.au](http://www.btatax.com.au)
- Business income – See the **business checklist** under the “Checklist” tab at [www.btatax.com.au](http://www.btatax.com.au)
- Any other investment income

### Capital Gains

- Sale of shares
  - Purchase contracts showing purchase amount
  - Sale contracts showing sale amount
- Sale of property – See **rental checklist** under “Checklist” tab at [www.btatax.com.au](http://www.btatax.com.au)
- Sale of business
  - Purchase contract and settlement statement
  - Sale contract & settlement statement
  - Solicitors fees
  - Other fees
- Managed fund unit sale/redemption
  - Purchase statements
  - Sale/redemption statements

### Motor vehicle expenses

- Motor vehicle (log book method only – please provide log book)
  - Fuel
  - Repairs
  - Insurance
  - Registration
  - RACQ membership
  - Purchase tax invoice
  - Finance contract
  - Tolls & parking

### Other expenses

- Clothing purchases (must have logo, be protective, or occupation specific)
- Tertiary courses and other training & education (must be related to your current work)
- Working from home expenses
  - Internet (monthly fee + percentage used for work)
  - Electricity (hours per week working from home)
  - Office equipment purchases (purchase price & date of purchase for depreciation)
  - Computer software
- Computer, Ipad, laptop, tools & other equipment purchases for work (purchase price & date of purchase for depreciation)
- Union fees
- Mobile (monthly fee + percentage used for work)
- Professional memberships & subscriptions
- Sun protection (sunglasses, sunscreen)
- Income protection insurance
- Pre tax super contributions
- Donations
- Tax agent fees
- Overnight travel expenses
  - Meals
  - Accommodation
  - Flights
  - Etc.
- Investment expenses
  - Financial planner fees
  - Interest on investment debt
  - Travel costs to see financial planner (e.g. KM, cab fare, parking etc)
- Any other work related expenses

### Other documents

- Private health insurance end of year statement
- Spouse - name, date of birth, income
- Child support
- Tax free government pension