



GRUBERS BECKETT  
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# Individual Tax Return Checklist - General

## General

- MUST have Bank account details – BSB and Account number
- MUST have Private Health Insurance Details
- Last year's Income Tax Return
- Records of sales and purchases of any shares, business or property
- Spouse details including assessable income
- Children's details including DOB and evidence of any Centrelink benefits/income
- Details regarding child support payments
- Details if lived or worked in a remote area or overseas

## Income

- PAYG Payment Summaries
- Employment termination payment
- Employer lump sum payments
- Personal services income and labour hire
- Australian superannuation lump sum payments
- Pensions or Government payments/allowances – Centrelink statement
- Interest earned for the relevant year from the banks, building societies etc.
- Details of trust, managed funds income
- Dividend statements
- If sold shares, need purchase and sale details

- Details of rental property income – Please see Rental Properties can and can't claim form
- If sold rental property, records of purchase and sale
- Details of any business income - Please see Advanced checklist
- Details of any other income earned including income from overseas

## Expenses

- Receipts for work related expenses e.g. uniforms, tools, education, union fees
- Income, sickness or accident premiums
- Motor vehicle expenses Incl. Estimation of kilometres if no logbook kept, otherwise logbook and all expense items
- Travel expenses
- Investment expenses e.g. bank fees, financial advisors fees, investment borrowing etc.
- Rental property expenses – Please see Rental Properties can and can't claim form
- Details for any personal superannuation contributions
- Cost of managing tax affairs
- Charitable donations
- Receipts for medical expenses where the family is out of pocket over \$2120 in medical expenses, including prescriptions, optical, dental and medical

**Please collect your receipts, tax invoices and documents for the items above – check them off when you've found them – this will make your tax return appointment faster and easier!**