

"Here's a handy checklist to collect everything you need to do your tax return"

Individual Tax Return Checklist – Basic

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

GENERAL

- ☐ Last Year's Income Tax Return
- ☐ Records of sales and purchases of any shares, business or property
- ☐ Private Health Insurance Details
- ☐ Spouse Details
- ☐ Children's details including D.O.B and evidence of any Centrelink benefits

INCOME

- ☐ PAYG Summaries
- ☐ Pensions or Government payments/Allowances
- ☐ Interest earned for the relevant year from the banks, building societies etc.
- ☐ Dividend Statements
- ☐ Details of rental property income
- ☐ Details of any business income
- ☐ Details of any other income earned

EXPENSES

- ☐ Work Related Expenses
For example: *uniform, tools, education, fees etc.*
- ☐ Motor Vehicle Expenses
Incl. estimation of Kilometres if no logbook kept, otherwise logbook and all expense items
- ☐ Travel Expenses
- ☐ Investment Expenses
For example: *bank fees, financial advisors fees, investment borrowings etc.*
- ☐ Rental Property Expenses
For example: *rates, body corp fees, agent fees, interest on loan, repairs and maintenance (inside and out), travel, water rates, depreciation schedule, etc.)*
- ☐ Cost of managing tax affairs
- ☐ Charitable donations

- ✓ Tick the box beside the items that apply to you.

Don't worry if you aren't sure about any of the items – your Etax Local Accountant will answer your questions.

Contact Etax Local Accountants to arrange your tax return appointment today!

1300 174 689

www.etaxlocal.com.au