
2013 Individual Tax Return Checklist

INCOME

- Employment income
- Centrelink, Youth Allowance, Pension income
- Dividends and Investment income
- Interest
- Other income e.g. subcontracting, foreign income
- Termination payments
- Rental income
- Sale of any assets

WHAT TO BRING

- PAYG Payment Summaries (Group Certificates)
- Dividend statements
- Passbooks, bank or summary statements
- Supply details, receipt book, banking summary
- Tax statements
- Statements of termination
- Real Estate summary, Yearly bank summary
- Buy & Sell contracts and additional holding costs

DEDUCTIONS

- Union Fees/Professional Associations
- Tools of Trade/Repairs
- Trade Journals/Seminars
- Work Clothes/Dry-cleaning/Laundry
- Gifts/Donations over \$2
- Sickness & Accident Policies
- Self-education Expenses
- Motor Vehicle Expenses
- Travelling & Accommodation
- Home Office Expenses
- Sun Protection Expenses

WHAT TO BRING

- Invoices
- Receipts
- Policy details, amounts paid
- Course details and receipts
- Motor vehicle log book and receipts for fuel, registration, insurance, repairs and lease or loan payments
- Invoices, Receipts and Purpose of trips
- Telephone, Electricity accounts, Computer expenses
- Please bring receipts & dockets for all other expenses to interview.
- Diary records showing total kilometres travelled in your private car for business purposes, to a maximum of 5,000 kilometres

TAX OFFSETS

- Sole Parent (if widowed, divorced or separated)
- Health Fund
- Superannuation
- Spouse
- Medical
- Zone Offset



WHAT TO BRING

- Name of super fund, policy number, amount contributed personally or on behalf of a spouse
- Details of medical expenses paid & amounts reimbursed by Medicare or private health fund if over \$2,120
- Statement from the health fund detailing coverage and rebate entitlement (if any)

OTHER ITEMS

- HECS/ Supplement Loan Scheme liability

WHAT TO BRING

- HECS/Supplement Loan Scheme statements

Please note that this list is not exhaustive and other deductions and entitlements may be available. If you are unsure please ask at the time of your interview.

NOTE: RECEIPTS FOR EXPENSES ARE NECESSARY TO CLAIM A TAX DEDUCTION AND NEED TO BE RETAINED FOR 5 YEARS IN CASE OF A TAX AUDIT.