

Tax Return CHECKLIST



INCOME STATEMENTS

- PAYG Payment Summaries from your employer
- Taxable Government allowances or pensions including JobSeeker, Newstart, Youth Allowance, Age Pension or Disability Pension
- Lump sum and termination payment summaries
- Interest earned from bank accounts or credit union statements
- Foreign source income earned or received

WORK RELATED EXPENSES

- Motor vehicle by cent per km or log book method if you use your vehicle for work. This does not include travel to and from work. Business travelling expenses also include car parking, taxi fees and road tolls
- Sun protection expenses for people who work outdoors
- Occupation specific uniform and protective clothing & footwear. This does not include casual clothes but clothing that allows you to be recognised in your profession for example:
 - chef pants/uniform
 - high-vis vests
 - non-slip shoes
 - rubber boots/rain boots
 - steel-capped boots
 - gloves and heavy duty clothing
 - overalls & aprons worn during work to avoid damage to ordinary clothes
- Self education expenses that will help with your current job which may include courses that are done to maintain or improve the skills at your current job, seminars and conferences related to your job
- Charity donations (over \$10) with receipts. This is not applicable for donations where you can win prizes
- Income protection insurance

- Any personal superannuation contributions you have made
- Union fees and memberships to industry organisations
- Professional membership fees
- Overtime meal allowances
- Home office setup expenses
- Home office running expenses such as heating, cooling, lighting, cleaning and internet
- Tax agent fees
- Other deductions that paid for work can be discussed with our accountants

CRITERIA FOR WORK EXPENSES

With work expenses you must make sure:

- You have spent your own money to purchase the goods and not have been reimbursed by your employer
- The work expenses are related to your job
- You have proof that you have paid for it. Make sure you keep your receipts or have your bank account statement ready

SAVINGS, INVESTMENTS OR DIVIDENDS

- Annual tax statements from trusts, managed investments, property and cash management trusts
- Income and expenses from investment properties
- Details of any capital gains or losses from the sale of shares and property
- Dividend statements for dividends received or invested

OFFSETS (REBATES)

- Health insurance and rebate entitlement statement
- HECS-HELP debt details