**INFORMATION REQUIRED**

**Individual Tax Return Check List**

Please ensure you bring the following information **(if applicable to you)** to assist us in preparing your income tax return. Please check the following and bring along your PAYG Payment Summaries, Statements, Accounts, Receipts etc, to help us prepare the return.

**Income / Receipts**

* Government pensions and allowances
* Payment summaries for salary and wages
* Lump sum and termination payments
* Other pensions and/or annuities
* Allowances (e.g. Entertainment, car etc.)
* Interest, rent and dividends
* Distributions from partnerships or trusts
* Annual tax statements for managed funds
* Details of any assets sold that were either used for income earning purposes or may be caught for capital gains tax.

**Check list of other possible deductions you may be entitled to:**

* Award transport allowance claims
* Bank and government charges on deposits of income, and deductible expenditure
* Car parking (when travelling on business)
* Conventions, conferences and seminars
* Depreciation of library, tools, business equipment, including portion of home computer
* Gifts or donations
* Home office running expenses  
  -Cleaning  
  -Cooling  
  -Heating  
  -Lighting  
  -Telephone
* Interest and dividend deductions  
  -Account keeping fees  
  -Ongoing management fees  
  -Interest on borrowings to acquire shares  
  -Advice relating to changing investment (but not setting them up)
* Interest on loans on equipment or income earning investments
* Motor vehicle expenses (business)
* Overtime meal allowances
* Protective/Industry clothing expenses
* Rental property expenses – including  
  -Advertising expenses  
  -Council/water rates  
  -Insurance  
  -Interest  
  -Land tax  
  -Legal expenses/management fees  
  -Repairs and maintenance  
  -Telephone expenses  
  -Travelling to inspect property
* Superannuation contribution by sole traders/substantially unsupported taxpayers
* Tax agent fees
* Telephone expenses (business)
* Tools of trade

**Check list of other information required:**

* Private health insurance details – annual tax statement
* Spouse details and approximate taxable income
* BSB and Account details for EFT of refund