



Connexion Accounting **“bringing the pieces together”**

Individual Tax Return Checklist

Income

- ❖ Your Employee Income Information
- ❖ Centrelink Payments
- ❖ Bank Interest
- ❖ Dividend Statements
- ❖ Trust Distribution Statements
- ❖ Pension or Annuity Payments
- ❖ Rental Statements or Income
- ❖ Details of any investments sold, including Properties, collectable assets, bitcoin or shares.
- ❖ Any income from business activities, no matter how small

Other

- ❖ Your ABN if you have one
- ❖ Spouse name, date of birth and income
- ❖ Bank details for refunds to be made into
- ❖ Child Support payments made or received
- ❖ **PLEASE BRING ANYTHING YOU THINK IS PERTINENT. WE CAN LET YOU KNOW IF IT CANNOT BE UTILISED, BUT IF WE DON'T KNOW ABOUT IT, WE CAN'T CLAIM IT.**

Deductions

- ❖ Employment Vehicle Usage. Logbook or kms travelled
- ❖ Travel expenses including: Tolls, Parking, Car Wash, Airfares etc
- ❖ Occupation specific uniform or protective clothing
- ❖ Sun protection expenses, ie sunscreen sunglasses, hats
- ❖ Mobile Phone and Internet usage for work
- ❖ Working from home hours or expenses.
- ❖ Tools and Equipment, purchases or maintenance.
- ❖ Computer equipment purchases, including cables and software
- ❖ Stationary expenses
- ❖ Education expenses that you have paid yourself in regards to your career
- ❖ Memberships and subscriptions
- ❖ Donations to Australian based charities
- ❖ Tax Agent Fees from previous year
- ❖ Rental property expenses including: Rates, Land Tax, insurance, repairs, Mortgage interest, body corporate fees, depreciation reports, gardening, cleaning or anything else.
- ❖ Extra Superannuation payments made by yourself
- ❖ Any business expenses in relation to business income.
- ❖ Details of Income Protection Insurance

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