



Tax Return Checklist

Name:

Bank Account Details:

The account your tax refund will be deposited into

Date of Birth:

BSB:

Account #

Tax File Number:

Account Name:

Income & Deductions

Please tick all that apply

Income

- Employment Income
- Capital Gain
- Superannuation Income Stream & Lump Sums
- Rent
- Dividends
- Interest
- Foreign Income
- Employee Share Scheme

Govt allowances & payments

- Job Seeker
- Centrelink
- Age Pension

Business income

- Summary of Payments Received from business activities during financial year
- Expenses related to operating your business

Offsets

- Private Health Insurance
- Spouse Details
- Dependants
- Child Support

Rental properties

- Property Purchase Details
- Agent Rental Summary
- Body Corporate Fees
- Water Bill
- Council Rates
- Insurance
- Repairs
- Land Tax
- Interest on Loan
- Capital Costs

Deductions

- Motor Vehicle Expenses
- Travel Expenses
- Uniform
- Internet & Telephone
- Self-Education & Training
- Tools
- Union Fees
- Subscriptions & Professional Memberships
- Income Protection Insurance
- Previous Year Accounting Fees
- Gifts & Donations
- Personal Superannuation Contributions



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