MONEYTAX FINANCIAL CENTRE
Taxation | Finance | Wealth Management

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Individual Income Tax Return Checklist

Income

- ☐ Interest income. Interest earned statements from banks or other institutions where you have not supplied the institution with your TFN or if it is a smaller institution e.g. Lawyers Trust account
- ☐ Dividend statements where in the past we have advised not found on the ATO Portal.
- ☐ End of year Tax Statements from Managed Funds
- ☐ Please have access to your latest payslip if you receive an Enterprise Bargaining Agreement allowance (normally on your mobile) for ease of checking of deductibility of an allowance expense.
- ☐ ESS statements – especially from an overseas country.
- ☐ Superannuation Income streams/Annuities
- ☐ Foreign pensions received

Other Income

- ☐ Rental properties – Income and expenses
- ☐ Capital Gains (e.g. from sale of property or shares). Ensure you bring in information to prove the purchase price of the asset. Please call us for clarification.
- ☐ Business / Foreign income
- ☐ Trust Distribution Statements
- ☐ Uber and / or Air BNB income and expense info
- ☐ Cryptocurrency if any disposals.

Deductions

- ☐ Motor vehicle expenses and Logbook
- ☐ Travel
- ☐ Uniforms or protective clothing
- ☐ Self-education Expenses
- ☐ Subscriptions or Memberships or Unions
- ☐ Home office expenses including electricity. Ensure completed a diary.

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- ☐ Phone & internet expenses
- ☐ Tools
- ☐ Margin loans and Investment costs
- ☐ Donations of at least $2
- ☐ Accounting Fees and on-going Financial Planning fees.
- ☐ Personal Super Contributions
- ☐ Income Protection Insurance policy and payment details

Bank Details

Don't forget to bring in your bank details so we know where to deposit refunds into!

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