



## Individual Income Tax Return Checklist

### Income

- Payment Summaries (previously known as 'Group Certificates')
- Interest income from banks or other institutions
- Dividend statements for dividends received or reinvested
- End of year Tax Statements from Managed Funds
- Termination Payment Summaries
- Lump Sum Payment Summaries

### Other Income

- Rental properties
- Capital Gains (e.g. from sale of property)
- Share schemes from Employee
- Business Foreign income

### Deductions

- Work related expenses
- Motor vehicle expenses
- Travel
- Uniforms or protective clothing
- Self-education Expenses
- Subscriptions or Memberships or Unions
- Home office expenses
- Phone & internet expenses
- Donations of at least \$2
- Income protection insurance

### Offsets

- Franking Credits
- Health insurance rebate entitlement statement
- PAYG instalments paid

### Bank Details

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

