

2020 Individual Tax Return Checklist

	Information Provided (Y/N)
Income	
PAYG summaries from employers (including employee share schemes) and/or superannuation funds – NOTE they are available from your mygov account alternatively we will have access to this information directly from the ATO	
Lump sum payments (eg ETPs)	
Managed fund annual tax statements	
Partnership or Trust distribution statements, including a copy of the partnership/trust tax return	
Interest earned for the year	
Dividend Statements	
Buy and sell contract notes for any shares sold	
Work-related Deductions	
Details of items bought during the year (e.g. laptop, printer, phone, office furniture)	
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Professional memberships/subscriptions	
Home Office/Internet/Mobile Phone etc (Where you are required to work from home due to COVID-19 or pre COVID-19)	
Continuing professional development / seminars	
Receipts for self-education expenses	
Protective clothing and uniform expenses	
Vehicle logbook for motor vehicle expenses (or km estimates). For the logbook method please provide fuel, insurance, rego, maintenance costs	
Other Deductions	
Receipts for donations of \$2 and over to registered charities	
Expenditure incurred in managing tax affairs (eg tax agent's fees)	
Expenditure incurred in earning investment income (interest on loans etc)	
Income protection insurance premium paid	
Personal super contributions made that are to be claimed as a deduction.	
Rental Properties	
Annual statement from property agent (if engaging the services of an agent)	

Date of when property was purchased (if newly acquired)	
Rental Income received if no agent engaged.	
Expenses (which are not detailed on the property agent annual statement) eg. Council rates, water rates, land tax and insurance	
Loan statements for property showing interest paid for the income year	
Details of property repairs and capital works made during the year	
If property is held by more than one individual, details of owners and their legal ownership percentage	
If property was disposed of during the income year, information relating to dates and costs associated with the acquisition and disposal of the property	
Period that property was rented out during the income year if not for the full year	
Offsets / Rebates	
Details of any superannuation contributions for spouse	
Details of dependants, including their age, occupation and income	
Private Health Insurance statement	
Other Information	
For new clients – a copy of last tax return lodged including any relevant depreciation schedules	
Any other income or deductions you have received or incurred, please forward to us and we will determine if it is relevant	
Review your last year's tax return for assistance with what you have previously included in your return	