

Individual Tax Return Items to Consider Checklist



- yes
- no
- maybe

To maximise your deductions and ensure that your tax return is complete, please review the following items and advise us if any apply to you.

Income

- Employment Income (salary / wages)
- Allowances / Tips / Director's Fees
- Employer Lump Sum Payment
- Employment Termination Payment (ETP)
- Centrelink / Pension Income
- Annuities / Superannuation Lump Sum Payments
- Interest Amounts & TFN Credits
- Dividends, Imputation & TFN Credits
- Employee Share Schemes
- Partnership & Trust Distributions
- Business Income
- Capital Gains/Losses
- Foreign Income
- Rental Property Income

Other Items to Consider

- HELP (Higher Education Loan Program) / HECS
- SFSS (Student Financial Supplement Scheme)
- Private Health Insurance Statement
- PAYG Instalment Credits
- Other Offsets & Tax Credits
- Reportable Fringe Benefits amount

General Tax Deductions

- Work Related Motor Vehicle Expenses (*Log Book may be required*)
- Work Related Travel Expenses (*Travel Diary may be required*)
- Work Related Clothing & Laundry Expenses
- Work Related Self-Education Expenses
- Other Work Related Expenses (*see below*)
- Interest & Dividend Deductions
- Gifts & Donations
- Tax Related Expenses (*Includes tax agent fees, and travel to tax appointment*)
- Undeducted Purchase Price-Pension / Annuity

Specific Deductions

- Income Protection Insurance
- Union Fees
- Home Office Expenses
- Seminars / Courses / Conferences
- Overtime Meal Expenses
- Briefcase
- Tools & Equipment
- Depreciation on work-related assets
- Calculator / Electronic Organiser
- Computer Costs (*includes repairs & printing costs*)
- Software
- Memberships & Subscriptions
- Telephone / Mobile Phone / Internet
- Bank Fees (*e.g. re: deductible purchases*)
- Interest Expenses (*e.g. re: deductible purchases*)
- Sun Protection Items (*e.g. sunscreens, safety glasses, protective gloves*)
- Reference Books / Journals / Trade Magazines

Talk to us TODAY for expert assistance to prepare your Tax Return and maximise your tax refund!

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