

Checklist for Individuals

Information required to complete Annual Income Tax Returns

- Bank account details (BSB and account number)**
- Termination payment statements
- Statement of pension, benefit or allowance from Centrelink
- Details of interest received from your bank, building society or credit union
- Dividend statements for shares you own
- Managed funds annual tax statements
- If any property or shares were sold
 - Sale contract and settlement statement
 - Purchase contract and settlement statement
 - Any costs incurred on the purchase or sale (legal fees, commissions, stamp duty)
- Rental property details (income, expenses, interest and rental statements)
- Work-related expenses
 - Workings from Home expenses - receipts & diary/timesheets
 - Professional journals/trade magazines, memberships/subscriptions
 - Professional development courses/self-education - expenses & receipts
 - Uniforms, Protective clothing - receipts
 - Union Fees
 - Travel Expenses - receipts
 - Vehicle logbook for motor vehicle expenses
- Invoice for last years tax return fee
- Income protection insurance details
- Personal Superannuation contributions
- Spouse details (date of birth and income earned)
- Details of children (date of birth and income earned)
- Private Health Fund statement
- Receipts for Donations of \$2 & over to deductible gift recipients