



# INDIVIDUAL TAX CHECKLIST

## INCOME

- Salary or wages (Group Certificates)
- Allowances, earnings, tips, director's fees
- Employer lump sum payments
- Employer termination payments (ETP's)
- Government Allowances (Newstart, Youth, Austudy)
- Australian Government Pensions & Allowances
- Superannuation lump sums
- Interest income (Include statements listing interest received from bank, building society, investment and term deposit accounts)
- Dividend Statements (Include statement of shares plus dividends)
- Partnership or Trust Distributions
- Rental property details (Include all income & expenses directly related to the property)

## DEDUCTIONS

- Work related motor vehicle expenses (Include a log book to indicate private portion)
- Work related uniform, occupation specific clothing, laundry & dry cleaning expenses
- Work related self-education expenses (Conferences, seminars, training courses, books)
- Other work related expenses (Expenses directly linked to income)
- Gifts or donations of \$2 or more if made to approved 'deductible gift recipient' body or fund
- Union and professional association fees
- Cost of managing tax affairs

## REBATES

- Private health insurance details
- HECS debt details
- Medical expense details (Only applies if your net medical expenses exceeds \$2,000)