

# 2019 INDIVIDUAL TAX RETURN CHECKLIST

choice  
group

Accounting | Finance | Wealth

## INCOME

1. Employment income
2. Centrelink, Youth Allowance, Pension Income
3. Dividends and Investment Income
4. Interest
5. Other Income e.g. subcontracting, foreign income
6. Termination payments
7. Rental income
8. Sale of any assets

## WHAT TO BRING

1. PAYG Payment Summaries (Group Certificates)
2. Dividend statements
3. Passbooks, bank or summary statements
4. Supply details, receipt book, bank summary
5. Tax statements
6. Statements of termination
7. Real Estate summary, Yearly bank summary
8. Buy & Sell contracts and additional holding costs

## DEDUCTIONS

1. Union Fees/Professional Associations
2. Tools of Trade/Repairs
3. Trade Journals/Seminars
4. Work Clothes/Dry-cleaning/laundry
5. Gifts/Donations over \$2
6. Sickness & Accident Policies
7. Self-education Expenses
8. Motor Vehicle Expenses
9. Travelling & Accommodation
10. Home Office Expenses
11. Sun Protection Expenses
12. Audit Protection Insurance

## WHAT TO BRING

1. Invoices
2. Receipts
3. Policy details, amounts paid
4. Course details and receipts
5. Motor vehicle log book and receipts for fuel, registration, insurance, repairs and lease or loan
6. Invoices, Receipts and Purpose of trips
7. Telephone, Electricity accounts, Computer expenses
8. Please bring receipts and dockets for all other expenses to your interview
9. Diary records showing total kilometres travelled

## TAX OFFSETS

1. Health Fund
2. Superannuation

## WHAT TO BRING

1. Name of Superannuation Fund, policy number, amount contributed personally or on behalf of a spouse

## OTHER ITEMS

1. HECS/Supplement Loan Scheme liability

## WHAT TO BRING

1. HECS/Supplement Loan Scheme statements

**NOTE: RECEIPTS FOR EXPENSES ARE NECESSARY TO CLAIM TAX DEDUCTION AND NEED TO BE RETAINED FOR 5 YEARS IN CASE OF A TAX AUDIT.**

