



ABN: 83 006 649 412

2A Station St, Seaford, Vic 3198
Postal: P.O Box 19, Seaford, Vic 3198

Telephone: (03) 8770 6600

Individual Income Tax Return Checklist

Please use this checklist and forward us or bring with you any relevant information as we cannot be sure when the Australian Tax Office Portal will have these details available.

Income

- Payment Summaries ---Number of jobs for the year:
- Lump Sum and Termination Payment Summaries
- Government payment statements, if received
- Interest income from banks and building societies
- Dividend statements for dividends received or reinvested
- Annual Tax Statements from Managed Funds
- Other income:
 - Rental properties
 - Business
 - Foreign income
 - Capital gains
 - Employee share schemes

Deductions

- Work related expenses:
 - Motor vehicle
 - Travel (fares and accommodation)
 - Uniforms/work-wear
 - Self-education and professional development
 - Union, registrations, tools, subscriptions, memberships
 - Home office, seminars, conferences
 - Telephone, computer, internet
 - Any other costs incurred earning income
- Donations to charities or building funds
- Income protection insurance

Offsets and Refunds

- Health insurance and rebate entitlement statement
- IAS statements or details of PAYG instalments paid
- Spouse details including taxable and exempt income

Tax Refunds – the Tax Office no longer issues refunds by cheque so you must advise us your bank account details, including the BSB and Account Number.

APPOINTMENT

DATE: _____

DAY: _____

TIME: _____

Call today on 03 8770 6600

OR

TELESERVICE

\$140 for a standard tax return (price down from \$ 160)

Call today on 03 8770 6600

Or Email michelle@taxlink.com.au