



2024 INDIVIDUAL TAX RETURN CHECKLIST

Full name: _____ DOB: _____ TFN: _____ Contact no: _____
 Residential Address: _____ Suburb: _____ State: _____ Postcode: _____

INCOME	PROVIDED	N/A
Employment income is "Tax Ready" on MyGov Account	<input type="checkbox"/>	<input type="checkbox"/>
Lump sum payments (e.g. employment termination payment)	<input type="checkbox"/>	<input type="checkbox"/>
Partnership distribution statement, including copy of partnership's tax return	<input type="checkbox"/>	<input type="checkbox"/>
Trust distribution statement, including copy of trust's tax return	<input type="checkbox"/>	<input type="checkbox"/>
Documentation re foreign source income, foreign assets or property	<input type="checkbox"/>	<input type="checkbox"/>
Bank statements stating interest earned, including for term deposits	<input type="checkbox"/>	<input type="checkbox"/>
Dividend statements	<input type="checkbox"/>	<input type="checkbox"/>
Employee share scheme statements	<input type="checkbox"/>	<input type="checkbox"/>
Managed fund annual tax statement and capital gains tax statement	<input type="checkbox"/>	<input type="checkbox"/>
Buy/sell contract certificates for shares (if any shares were sold)	<input type="checkbox"/>	<input type="checkbox"/>

WORK-RELATED DEDUCTIONS	PROVIDED	N/A
Details of depreciable assets bought during the year (e.g. laptops, desks etc.)	<input type="checkbox"/>	<input type="checkbox"/>
Home office expenses (fixed rate @ \$0.67 p. h) - Hours of Work from home (record keeping required)	<input type="checkbox"/>	<input type="checkbox"/>
Home office expenses (actual method) – business percentage and receipts for home office expenses such as internet, mobile, electricity etc. (record keeping required)	<input type="checkbox"/>	<input type="checkbox"/>
Professional journals/trade magazines	<input type="checkbox"/>	<input type="checkbox"/>
Professional memberships/subscriptions	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for continuing professional development courses and seminars	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for self-education expenses	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for other work-related deductions such as protective clothing, uniform expenses, laundry, tools and equipment, and travel	<input type="checkbox"/>	<input type="checkbox"/>
Motor vehicle expenses logbook method – business percentage and receipts for expenses	<input type="checkbox"/>	<input type="checkbox"/>
Motor vehicle expenses fixed rate at \$0.85 per KM – total number of KM	<input type="checkbox"/>	<input type="checkbox"/>

OTHER DEDUCTIONS	PROVIDED	N/A
Receipts for donations of \$2 and over to registered charities (DGR)	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in managing tax affairs (e.g. tax agent's fees)	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in earning interest, dividend and other investment income (e.g. investment advice fees)	<input type="checkbox"/>	<input type="checkbox"/>
Income protection insurance, or sickness and accident premiums	<input type="checkbox"/>	<input type="checkbox"/>
Additional super contributions including the notice of intent to claim from the super fund	<input type="checkbox"/>	<input type="checkbox"/>



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RENTAL PROPERTIES	PROVIDED	N/A
A copy of the property purchase contract if not provided previously	<input type="checkbox"/>	<input type="checkbox"/>
Period property was available for rent during the income year	<input type="checkbox"/>	<input type="checkbox"/>
Period property was rented out during the income year	<input type="checkbox"/>	<input type="checkbox"/>
Records detailing rental income and expenses (i.e. annual statement from property agent etc.)	<input type="checkbox"/>	<input type="checkbox"/>
Loan statements for property showing interest paid for the income year	<input type="checkbox"/>	<input type="checkbox"/>
Was the loan renegotiated during the year?		
Expenses incurred such as water charges, land tax and insurance premiums	<input type="checkbox"/>	<input type="checkbox"/>
Details of depreciable assets bought or disposed of during the year	<input type="checkbox"/>	<input type="checkbox"/>
Details of any capital works or additions on the property	<input type="checkbox"/>	<input type="checkbox"/>
Tax Depreciation Report from quantity surveyor if available	<input type="checkbox"/>	<input type="checkbox"/>
If the property was disposed of during the income year, information including the purchase and sale documents, solicitor fees, settlement sheets, agents commission and advertising, etc.	<input type="checkbox"/>	<input type="checkbox"/>

OFFSETS / RABATES	PROVIDED	N/A
Details of any superannuation contributions for spouse	<input type="checkbox"/>	<input type="checkbox"/>
Spouse or De facto partner's income, date of birth and full name	<input type="checkbox"/>	<input type="checkbox"/>
Details of dependents, including their age, occupation and income	<input type="checkbox"/>	<input type="checkbox"/>
Private health insurance statement	<input type="checkbox"/>	<input type="checkbox"/>

SOLE TRADER INCOME / EXPENSES	PROVIDED	N/A
Cashbook, which includes records of drawings taken before the business income were banked	<input type="checkbox"/>	<input type="checkbox"/>
Copies of Business Activity Statements lodged and the workpapers	<input type="checkbox"/>	<input type="checkbox"/>
Copies of PAYG summaries/salary income statements for employees	<input type="checkbox"/>	<input type="checkbox"/>
Details of any government grants, rebates or payments received	<input type="checkbox"/>	<input type="checkbox"/>
Details of superannuation contributions for employees	<input type="checkbox"/>	<input type="checkbox"/>
Details of any assets purchased, including date of purchase and amount	<input type="checkbox"/>	<input type="checkbox"/>
Payments of salaries and superannuation to associates	<input type="checkbox"/>	<input type="checkbox"/>
Access to accounting software or records (e.g. trial balance, profit and loss, and balance sheet)	<input type="checkbox"/>	<input type="checkbox"/>
Statements of all liabilities of the business	<input type="checkbox"/>	<input type="checkbox"/>
Notice of superannuation contributions for self-employed persons including notice of intent to claim from the super fund	<input type="checkbox"/>	<input type="checkbox"/>

OFFSETS / RABATES	PROVIDED	N/A
Copies of Instalment Activity Statements lodged	<input type="checkbox"/>	<input type="checkbox"/>
Any other information that you think is relevant	<input type="checkbox"/>	<input type="checkbox"/>