

# INDIVIDUAL Income Tax Return Checklist

**Not sure what to bring or claim as a deduction in your income tax return?**

**Go through our checklist so can you provide us with all the relevant information, then we won't need to chase you up and your return can be finalised without delay.**

## INCOME

- Interest income from banks and building societies.
- Dividend statements for dividends received or reinvested.
- Annual Tax Statements from Managed Funds
- Trust distribution statements
- Purchase or sale details for any investments including shares, managed funds or cryptocurrency.
- Lump Sum & Termination Payment Summaries.
- Foreign income, including pensions.

## RENTAL PROPERTY

- Annual Rental Agents Statement
- Invoices for rates, insurance, repairs & maintenance, land tax
- Loan statements for each property

## NEW CLIENTS

- Prior year Income Tax Return
- Prior year accountancy fees

## DEDUCTIONS

- Receipts for donations to charities
- Motor vehicle expenses including car finance statements, petrol, repairs & maintenance, registration & a valid logbook completed within the last 5 years.  
(If no logbook is prepared, please provide a diary or details of work-related kilometres travelled)
- Receipts for self-education expenses (e.g. fees, books, computer costs, travel)
- Receipts for work-related expenses (e.g.: travel, uniform, laundry, mobile phone, internet, subscriptions, protective clothing, tools, union fees, computers, stationery)
- Personal Superannuation contributions made, including confirmation letter from your superannuation fund confirming the deduction.
- Annual Income Protection Insurance premiums paid personally.
- "Working from Home" deductions  
Provide a list of days you worked from home during the financial year.

***Note: The ATO may request documents substantiating deductions claimed  
Please keep records for 5 years***