

Income Tax Return Checklist – Individuals

Please use this checklist and bring any relevant information with you as we cannot be sure when the Online Services For Agents will have these details available.

INCOME

- Payment Summaries and Income Statements*
- 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, journals, tools, subscriptions and 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

* End-of-year payment summary changes

The way most employers report tax and super information has changed. This means you will no longer receive an end-of-year payment summary from your employer. This is now called your income statement.

Business Class Solutions can download your income statement for you on request at any time. We can also view your income statement information when we complete your return and don't require that you bring your income statement to your appointment.

TAX REFUNDS – the Tax Office no longer issues refunds by cheque. Please ensure **you bring your bank account details, including the BSB and Account Number with you to your appointment.**

BOOK AN APPOINTMENT (click a button below)

Remote Zoom Meeting

Lodge via Email

Face-to-Face Meeting

Your Face-to-Face Meeting details

Office: _____ Date: _____

Day: _____ Time: _____

In the interests of strictly protecting client data and systems, we are unable to accept files via USB.