

NU-AGE ACCOUNTING

INDIVIDUAL TAX RETURN CHECKLIST



INCOME - please supply all documents

- ☐ PAYG Payment Summaries
- ☐ Employment Termination Payments
- ☐ Government Payment Statements
- ☐ Bank Interest Earned
- ☐ Dividend Statements
- ☐ Distributions from Partnerships and Trust

OTHER INCOME

- ☐ Rental Property Income
- ☐ Business Income
- ☐ Foreign Income
- ☐ Capital Gains
- ☐ Employee Share Schemes
- ☐ Any other income (please specify)

DEDUCTIONS - work related expenses

- ☐ Car Expenses (kilometres or logbook, generally not to and from home)
- ☐ Protective Clothing, Safety Footwear, Tools etc. (not provided by employer)
- ☐ Union Fees, Subscriptions, Memberships, Registrations
- ☐ Mobile Phone
- ☐ Computer/Internet
- ☐ Work-related Self Education Expenses (course fees, travel and accommodation)
- ☐ Home Office (electricity, furniture and equipment, telephone, internet)
- ☐ Assets >\$300 (e.g. computer, telephone, tools)
- ☐ Sun Protection (e.g. sunglasses, hats, sunscreen)

GENERAL EXPENSES

- ☐ Tax Deductible Donations
- ☐ Tax Preparation Fees
- ☐ Income Protection Premiums
- ☐ Superannuation Contributions

TAX OFFSETS & REBATES

- ☐ Private Health Insurance Details
- ☐ HELP/SFSS/TSL Loan Details
- ☐ After-Tax Super Contributions
- ☐ Names, DOBs & Income of Dependents

