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# 2017 Individual Tax Return Checklist

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## INCOME

- Employment income
- Centrelink, Youth Allowance, Pension income
- Dividends and investment income
- Interest
- Other income e.g. subcontracting, foreign income
- Termination payments
- Rental income
- Sale of any assets

## WHAT TO BRING

- PAYG Payment Summaries (Group Certificates)
- Dividend statements
- Passbooks, bank or summary statements
- Supply details, receipt book, banking summary
- Tax statements
- Statements of termination
- Real Estate summary, yearly bank summary
- Buy & sell contracts and additional holding costs

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## DEDUCTIONS

- Union fees/professional associations
- Tools of trade/repairs
- Trade journals/seminars
- Work clothes/dry-cleaning/laundry
- Gifts/donations over \$2
- Sickness & accident policies
- Self-education expenses
- Motor vehicle expenses
- Travelling & accommodation
- Home office expenses
- Mobile phone expenses
- Sun protection expenses
- Audit protection insurance

## WHAT TO BRING

- Invoices
- Receipts
- Policy details, amounts paid
- Course details and receipts
- Motor vehicle log book and receipts for fuel, registration, insurance, repairs and lease or loan payments
- Invoices, receipts and purpose of trips
- Telephone, electricity accounts, computer receipts, diary/logbook for work use
- Please bring receipts and dockets for all other expenses to your interview
- Diary records showing total kilometres travelled in your private car for business purposes, to a maximum of 5,000 kilometres

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## TAX OFFSETS

- Sole Parent (if widowed, divorced or separated)
- Health fund
- Superannuation
- Zone Offset

## WHAT TO BRING

- Name of super fund, policy number, amount contributed personally or on behalf of a spouse
- Statement from the health fund detailing coverage and rebate entitlement (if any)



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## OTHER ITEMS

- HECS/ Supplement Loan Scheme liability

## WHAT TO BRING

- HECS/Supplement Loan Scheme statements

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Please note that this list is not exhaustive and other deductions and entitlements may be available. If you are unsure please ask at the time of your interview.

**NOTE: RECEIPTS FOR EXPENSES ARE NECESSARY TO CLAIM A TAX DEDUCTION AND NEED TO BE RETAINED FOR 5 YEARS IN CASE OF A TAX AUDIT.**