

# Individuals- Income Tax Return Checklist



Please use this checklist to help you collect all your receipts, tax invoices and supporting documents you will need to do your tax return.

## INCOME

- ☐ Pay As You Go (PAYG) Summaries **(from MyGov from 1/7/2020)**
- ☐ Job Keeper/Job Seeker Payment
- ☐ ETP Payment Summaries
- ☐ Government Payments & Pensions
- ☐ Superannuation Payments
- ☐ Personal Services Income & Expenses
- ☐ Bank Interest Received
- ☐ Dividends from Shares
- ☐ Employee Share Scheme Statement
- ☐ Partnerships/Trust Income
- ☐ Managed Funds Tax Statements
- ☐ Business Income & Expenses
- ☐ Capital Gains Tax Information
- ☐ Purchase and Sale Records for Shares, Crypto, Investment Property etc
- ☐ Foreign Income and Related Expenses
- ☐ Rental Property Income
- ☐ Any other Income Received

## DEDUCTIONS

- ☐ Work Related Car Expenses
- ☐ Logbook and Running Costs
- ☐ Km's Travelled if up to 5000 km
- ☐ Work Related Travel - Overseas or Domestic
- ☐ Uniform/PPE/Sun/Weather Protection
- ☐ Self-Education – eg. Fees, books, computers
- ☐ Tools and Equipment
- ☐ Telephone/Mobile/Internet
- ☐ Subscriptions
- ☐ Seminars
- ☐ Union Fees
- ☐ Reference Books and Resources
- ☐ Hours Spent Working from Home
- ☐ Gifts and Donations
- ☐ Last Year's Tax Agent Fee
- ☐ Income Protection Insurance Premium
- ☐ Personal Concessional Super Contribution **(Require the Acknowledgement of Intention to Claim Form)**
- ☐ Any Other Deductions

## FOR NEW CLIENTS

- ☐ A copy of last year's lodged tax return

## INVESTMENT PROPERTY

- ☐ Rental Property Income- Agents Annual Rental Statement
- ☐ Advertising Costs
- ☐ Body Corporate Fees
- ☐ Borrowing Expenses
- ☐ Cleaning
- ☐ Council Rates
- ☐ Capital Allowance (Depreciation on Plant)
- ☐ Gardening/Lawn Mowing
- ☐ Insurance
- ☐ Interest on loans
- ☐ Land Tax
- ☐ Legal Fees
- ☐ Pest Control
- ☐ Property Agent Fees/Commission
- ☐ Repairs and Maintenance
- ☐ Capital Works Deductions (Building Write Off)
- ☐ Stationery, Telephone, Postage
- ☐ Water Charges
- ☐ Quantity Surveyor's Depreciation Report - If Available
- ☐ Sundry Rental Costs

## TAX OFFSETS

- ☐ Seniors and Pensioners
- ☐ Private Health Insurance Statement
- ☐ Zone Details – If you live in a remote area you may be eligible for an offset
- ☐ Super Contribution on behalf of Spouse
- ☐ Medical Expenses and Invalid Carer
- ☐

## OTHER THINGS TO BRING

- ☐ Bank Account Details, BSB and AC no.
- ☐ Spouse's Taxable Income
- ☐ Tax Free Government Pensions
- ☐ Child Support Paid
- ☐ Current Phone Number and Address
- ☐ Prior Year Tax Return for Items that Carry Forward, eg assets/tax loss
- ☐ Travel Diary
- ☐ Work/Home Office Diary

Appointment:

Date: \_\_\_\_\_ Time: \_\_\_\_\_

Contact Us:

Phone: 07 3256 8280, Office: 14 Miles St, Clayfield QLD 4011 E: admin@rubylam.com.au

**If you have any questions, please feel free to contact us. We promise we will make it easy!!! Our job is to minimize your tax and maximize your refund!!! Please contact us today.**