

# Individual Tax Return Checklist



We've put together a quick checklist to help you get prepared this tax season.

Use this as a general guide to help you better understand what documents are required to substantiate your deduction, and please make sure to have these documents ready prior to your appointment

## Income

- Ensure your Payment Summary/Income Statement is finalised by your employer
- Allowances/Directors Fees
- Employment Termination Payments
- Government Payments
- Annuities & Super Lump Sums & Super pensions
- Employee Share Schemes
- Investment Income & Schedules - Rental Statements
- Investment Income & Schedules - Dividends
- Investment Income & Schedules - Interest
- Investment Schedules (Stock Reports, Crypto Reports, etc.)
- Distributions from Trusts and/or Partnerships
- Capital Gains on the Disposal of Assets
- Business Income
- Any other income

## Other

- Please provide you Private Health Insurance Details
- Please Provide you Spouse & Dependent Details

## Deductions

- Work Related:
  - Car
  - Travel
  - General
- Education
- Home Office
- Phone & Internet
- Hardware & Software
- Tools & Equipment
- Donations
- Industry/Trade Journals & Subscriptions
- Union Fees
- Investment Costs
- Tax Return Preparation Fees
- Personal Super Contributions
- Business Expenses
- Income Protection Insurance
- Capital Losses