



**Flourishing Figures**  
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## Individual Tax Return Checklist

### Income

- + PAYG Summaries (Group Certificates)
- + Your Occupation
- + Centrelink Payments
- + Bank Interest
- + Dividend Statements
- + Distribution Statements
- + Pension / Annuity Payment Summaries
- + Any other income
- + Rental Income and Expenses (Agent Statement, Rates, Land Tax, Insurance, Repairs, Loan Statements, Body Corporate Fees, Quantity Surveyor Report)
- + Details of any Capital Gains on Investments sold, including dates and costs of purchase and sale
- + Sole Trader Business Income and Expenses

### Other

- + Private Health Insurance Statement
- + Spouses Full Name, DOB, Taxable and Exempt Income
- + Eligible Net Medical Expenses (disability aids, attendant or aged care only)

### Deductions

- + Work Related Motor Vehicle Expenses (km's travelled or Logbook)
- + Work Related Travel Expenses
- + Work Clothing Expenses
- + Sun Protection Expenses (if working outside)
- + Mobile, Phone and Internet Expenses
- + Tools & Equipment (i.e. Laptop) - For prior year items, your last year's tax return is required
- + Printing & Stationery Expenses
- + Self-Education Expenses
- + Memberships and Subscriptions
- + Donations to Charities
- + Tax Agent Fees
- + Income Protection Insurance
- + Notice of Intent to claim Superannuation Deduction from Superannuation Fund
- + Interest and Dividend Expenses (margin loan interest, bank fees etc)
- + Any other deductions

- + Child Support Payments made
- + BSB and Bank Account Number for refunds
- + Any other documents you believe may be helpful

Liability limited by a scheme approved under Professional Standards Legislation  
 Chartered Accountant & Registered Tax Agent

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