

## Individual Tax Return Checklist

### Personal Details

- Personal details & TFN
- BSB & Account Number
- PAYG Summary
- Return & Assessment Notice

### Employment Income Deductions

- Proof of purchases (Invoices & Receipts)
- Bank Statements

### Investment Related Deductions

- Asset purchase/sale agreements
- Borrowing costs (interest/fees)

### Other Deductions

- Vehicle and travel expenses
- Clothing, laundry, dry-cleaning
- Gifts & donations
- Home office expenses
- Self-education expenses
- Tools, equipment & other assets
- Books & journals
- Cost of managing tax affairs
- Election expenses
- Income protection insurance
- Interest charged by ATO
- Overtime meals
- Project pool deductions
- Seminars, conference, education workshops
- Union fees
- Specific industry & occupation deductions

### Supportive Evidence

- Bank statements
- Dividend statements
- Receipts/invoices for equipment or asset purchase
- Receipts/invoices for expense claims and repairs
- Contracts (e.g. loan agreements)
- Motor vehicle log book & odometer reading
- Prior year tax losses
- Tax credit vouchers
- Tenant and rental records (Annual Rental Property Statement)

### Offsets & Rebates

- Government Benefits received
- Health Insurance Statement
- Superannuation Contributions
- Remote area zone allowance

### Investment Property

- Advertising fees
- Body corporate fees & charges
- Borrowing expenses
- Cleaning
- Council rates
- Deductions for decline in value
- Gardening/lawn mowing
- Insurance
- Interest on loans
- Land tax
- Legal expenses
- Pest control
- Property agent/commission
- Repairs and maintenance
- Capital works deductions
- Stationary, telephone, postage
- Travel expenses
- Water/rates charges
- Sundry rental expenses

### Income Earned Statements

- Bank statements
- Buy/sell contracts
- Capital gains statement
- Pension & annuities statement
- Partnership & trust distributions
- Insurance statements
- Lump sum payment details (e.g. redundancy payments)
- Rental property annual statement
- Other (if applicable)

*\*Please note that this is not an exhaustive list. If you are uncertain or have any queries, please contact our office.*

**Email:** [admin@getgrowth.com.au](mailto:admin@getgrowth.com.au)

**Phone:** 3812 1420