

Individual Income Tax Return Checklist

Income

- PAYG Summary Statement
- Bank Statements
(Interest received / fees charged)
- Summary of Investments
- Share Dividend Statements
- Trust Distribution Statements
- Managed Fund Statements
- Buy / Sell Contract Notes
- Social Security Summary Statements
- Lump Sum Payment Statements
(e.g. Eligible Termination Statements)

Rental Income

- Annual Agent's Statement
- Invoices for any amounts paid personally
(i.e. Council rates / water rates / insurance etc.)
- If property managed personally - complete
'Rental Property Income & Expenses
worksheet - [click here to download](#)

Deductions

- Receipts of donation to charities
- Receipts of work related deductions
(i.e. Car / travel / uniform / laundry)
- Receipts of self education expenses
(i.e. Fees / books / computer costs / travel ex-
penses)
- Bank Statements on funds borrowed to
purchase investments
- Receipts of Income Protection Insurance

Other Information

- Private Health Insurance Statement
- Medical Receipts
(If spent more than \$1,500)

New Clients

- Prior Year's Income Tax Return
- Prior Year Accountancy Fees