



**AV CHARTERED
ACCOUNTANTS**

COMMITTED TO YOUR BUSINESS SUCCESS

2019 Individual Tax Return Checklist

| Information | Information provided | Not applicable |
|---|--------------------------|--------------------------|
| Income | | |
| PAYG payment summaries (eg from employers) | <input type="checkbox"/> | <input type="checkbox"/> |
| Lump sum payments (eg employment termination payment) | <input type="checkbox"/> | <input type="checkbox"/> |
| Australian Government allowance and payments (e.g. Newstart) | <input type="checkbox"/> | <input type="checkbox"/> |
| Superannuation streams | <input type="checkbox"/> | <input type="checkbox"/> |
| Partnership distribution statement, including copy of partnership's tax return | <input type="checkbox"/> | <input type="checkbox"/> |
| Trust distribution statement, including copy of trust's tax return | <input type="checkbox"/> | <input type="checkbox"/> |
| Documentation re foreign source income, foreign assets or property | <input type="checkbox"/> | <input type="checkbox"/> |
| Bank statements stating interest earned, including for term deposits | <input type="checkbox"/> | <input type="checkbox"/> |
| Dividend statements | <input type="checkbox"/> | <input type="checkbox"/> |
| Employee share scheme statements | <input type="checkbox"/> | <input type="checkbox"/> |
| Income protection, sickness/accident payouts | <input type="checkbox"/> | <input type="checkbox"/> |
| Managed fund annual tax statement and capital gains tax statement | <input type="checkbox"/> | <input type="checkbox"/> |
| Buy/sell contract notes for shares (if any shares were sold) | <input type="checkbox"/> | <input type="checkbox"/> |
| Details of any property disposed of | <input type="checkbox"/> | <input type="checkbox"/> |
| Work-related deductions | | |
| Details of depreciable assets bought during the year (eg laptops) | <input type="checkbox"/> | <input type="checkbox"/> |
| Details of travel expenses | <input type="checkbox"/> | <input type="checkbox"/> |
| Details and receipts for home office expenses | <input type="checkbox"/> | <input type="checkbox"/> |
| Professional journals/trade magazines | <input type="checkbox"/> | <input type="checkbox"/> |
| Professional memberships/subscriptions | <input type="checkbox"/> | <input type="checkbox"/> |
| Receipts for continuing professional development courses and seminars | <input type="checkbox"/> | <input type="checkbox"/> |
| Receipts for self-education expenses | <input type="checkbox"/> | <input type="checkbox"/> |
| Receipts for other work-related deductions such as protective clothing, uniform expenses, tools and equipment, and travel | <input type="checkbox"/> | <input type="checkbox"/> |
| Vehicle logbook for motor vehicle expenses (if using the logbook method) or Approximate work-related travel km's (if using cents per km) | <input type="checkbox"/> | <input type="checkbox"/> |
| Other deductions | | |
| Receipts for donations of \$2 and over to registered charities | <input type="checkbox"/> | <input type="checkbox"/> |
| Expenditure incurred in managing tax affairs (eg tax agent's fees) | <input type="checkbox"/> | <input type="checkbox"/> |

| Information | Information provided | Not applicable |
|---|--|--|
| Expenditure incurred in earning interest, dividend and other investment income (eg investment advice fees) Details of personal superannuation contributions Income protection insurance premiums | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Rental properties Date when property was purchased, including details of co-ownership if applicable Period property was rented out during the income year Records detailing rental income (annual statement from property agent, if engaging services of an agent) Loan statements for property showing interest paid for the income year Expenses incurred such as water charges, land tax and insurance premiums Details of depreciable assets bought or disposed of during the year Copy of quantity surveyor report (if obtained) Details of any capital works on the property If the property was disposed of during the income year, information relating to dates and costs associated with the disposal of the property | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Offsets/rebates Details of any superannuation contributions for spouse Details of dependants, including their age, occupation and income Private health insurance statement | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| If operating as a sole trader Cashbook, which includes records of drawings taken before the business takings were banked Copies of Business Activity Statements lodged Copies of PAYG summaries for employees Details of any government grants, rebates or payments received Details of superannuation contributions for employees (including reportable employer super contributions) Details of any assets purchased, including date of purchase and amount Payments of salaries and superannuation to associates Records from accounting software (eg trial balance, profit and loss, and balance sheet) | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Other information Any other information that you think is relevant | <input type="checkbox"/> | <input type="checkbox"/> |