



AV CHARTERED ACCOUNTANTS

COMMITTED TO YOUR BUSINESS SUCCESS

2022 Individual Tax Return Checklist

Information	Information provided	Not applicable
Income		
PAYG payment summaries (e.g. from employers)	<input type="checkbox"/>	<input type="checkbox"/>
Lump sum payments (e.g. 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 term deposits	<input type="checkbox"/>	<input type="checkbox"/>
Dividend statements (which shows HIN/SRN)	<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"/>
Shares, buy/sell contract notes	<input type="checkbox"/>	<input type="checkbox"/>
Cryptocurrency, buy/sell documentation and transaction statements	<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 (e.g. 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"/>
Details of work from home hours, and/or details of items purchased for your home office	<input type="checkbox"/>	<input type="checkbox"/>
Details of Rapid Antigen Tests purchased to attend your workplace.	<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"/>

newcastle
PO Box 258
Unit 9, 57 Crescent Road,
Waratah NSW 2298
phone +61 2 4929 5533

maitland
PO Box 85
Level 1, 8 Bulwer Street,
Maitland NSW 2320
phone +61 2 4933 6100

AVCA Pty. Limited trading as AV Chartered Accountants
Director - Antony J Vidray BCom FCA Chartered Tax Advisor
abn 63 149 926 269
email mail@avca.net.au
www.avca.net.au



**AV CHARTERED
ACCOUNTANTS**

Information	Information provided	Not applicable
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 (e.g. tax agent's fees)	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in earning interest, dividend and other investment income (e.g. investment advice fees)	<input type="checkbox"/>	<input type="checkbox"/>
Details of personal superannuation contributions (e.g. acknowledgement letter of your intent to claim a deduction from your super fund)	<input type="checkbox"/>	<input type="checkbox"/>
Income protection insurance premiums	<input type="checkbox"/>	<input type="checkbox"/>
Rental properties		
Date when property was purchased, including details of co-ownership if applicable	<input type="checkbox"/>	<input type="checkbox"/>
Period property was rented or available for rent during the income year	<input type="checkbox"/>	<input type="checkbox"/>
Records detailing rental income (annual statement from property agent, if engaging services of an agent)	<input type="checkbox"/>	<input type="checkbox"/>
Loan statements for property showing interest paid for the income year	<input type="checkbox"/>	<input type="checkbox"/>
Expenses incurred (e.g. water and council rates, land tax and insurance premiums)	<input type="checkbox"/>	<input type="checkbox"/>
Details of depreciable assets bought or disposed of during the year	<input type="checkbox"/>	<input type="checkbox"/>
Copy of quantity surveyor report (if obtained)	<input type="checkbox"/>	<input type="checkbox"/>
Details of any capital works on the property	<input type="checkbox"/>	<input type="checkbox"/>
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"/>
Offsets/rebates		
Details of any superannuation contributions for spouse	<input type="checkbox"/>	<input type="checkbox"/>
Details of dependants, including their age, occupation and income	<input type="checkbox"/>	<input type="checkbox"/>



**AV CHARTERED
ACCOUNTANTS**

Information	Information provided	Not applicable
If operating as a sole trader		
Details of income and expenses in relation to your business	<input type="checkbox"/>	<input type="checkbox"/>
Details of Business Activity Statements lodged	<input type="checkbox"/>	<input type="checkbox"/>
Details of salaries and super contributions paid to associates and employees	<input type="checkbox"/>	<input type="checkbox"/>
Details of any government grants, rebates or payments received	<input type="checkbox"/>	<input type="checkbox"/>
Details of any assets purchased, including date of purchase and amount	<input type="checkbox"/>	<input type="checkbox"/>
Records from accounting software (e.g. trial balance, profit and loss, and balance sheet)	<input type="checkbox"/>	<input type="checkbox"/>
Other information		
Current contact details (e.g. home address, email and phone number)	<input type="checkbox"/>	<input type="checkbox"/>
Spouse's taxable income	<input type="checkbox"/>	<input type="checkbox"/>
Child support you paid	<input type="checkbox"/>	<input type="checkbox"/>
Any other information that you think is relevant	<input type="checkbox"/>	<input type="checkbox"/>