



CAREY ELDER & ASSOCIATES

Individual Income Tax Return Checklist

- PAYG Payment Summaries/Group Certificates
- Payment Summaries from Centrelink e.g. Youth Allowance, Newstart, Pensions
- Eligible termination payment statements
- Interest earned from bank accounts
- Dividend statements from share holdings.
- Annual statements from managed investment funds and cash management trusts
- Income and expenses from investment/rental property(s).
- Share buy/sell statements (for capital gains/losses)
- Work Related Expenses:**
 - Motor vehicle expenses for work purposes
 - Travel expenses (fares and accommodation)
 - Tools of trade
 - Uniforms and protective clothing
 - Self-education expenses
 - Telephone, computer and internet expenses
 - Union fees, other subscriptions or memberships
- Donations to charities
- School building levies
- Tax agent fees for the prior year
- Income protection insurance
- Private health insurance annual tax statement
- Amount of HELP debt or Financial Supplement loans outstanding
- Spouse date of birth and taxable income
- IAS statements or details of PAYG instalments paid
- Any other expenses you may feel be deductible