Individuals Tax Return Checklist

Depending on your circumstances, the following information will be required to ensure that your income tax return is complete and accurate:

- **Payment summaries** from employers, Centrelink or superannuation funds.

- **Interest** you may have earned on term deposits or other bank accounts, and tax withheld (don't forget any accounts you may have closed during the year)

- Share **dividend statements** showing the "franked / unfranked" portions any "franking credits" which apply. (Note that these are assessable even if the dividends were "reinvested" and you did not receive any cash.

- Income from **managed investments**. The fund should provide you with an annual tax statement about what to include in your tax return.

- **Work-related expenses**. These may include car or other travel expenses for work (but not to-or-from work), uniforms, education or training courses, union fees, subscriptions, tools, trade licences, stationery or other resources.

- **Other expenses**. For example: donations, tax agent fees, income protection insurance.

- If you own a **rental property**, details of all income and expenses including mortgage interest, rates, repairs, property agents' fees and depreciation schedule (if any). For the first year, a copy of settlement sheet.

- If you have **sold any shares or property**, you may have derived a capital gain or incurred a loss. Please provide details of the date of purchase and the total purchase cost, the date of sale and the net sale proceeds.

- If you have **private health insurance**, we will need the information from your annual statement.

- **Bank Account Details**. The ATO is no longer issuing refund cheques, so please provide these details.

(If you run a small business, please also see our Business Tax Return Checklist)