

2024 Individual Tax Return Checklist

Name of taxpayer: _____

Address: _____

Preferred contact no.: _____

| Information | Information provided | Not applicable |
|---|--------------------------|--------------------------|
| Income | | |
| Income statement/PAYG payment summaries | <input type="checkbox"/> | <input type="checkbox"/> |
| Lump sum payments (eg employment termination payment) | <input type="checkbox"/> | <input type="checkbox"/> |
| Non-cash benefits | <input type="checkbox"/> | <input type="checkbox"/> |
| Partnership distribution statement, including copy of partnership tax return | <input type="checkbox"/> | <input type="checkbox"/> |
| Trust distribution statement, including copy of trust tax return | <input type="checkbox"/> | <input type="checkbox"/> |
| Documentation regarding 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"/> |
| Managed fund annual tax statement and capital gains tax statement | <input type="checkbox"/> | <input type="checkbox"/> |
| Buy/sell contract notes for any share transactions | <input type="checkbox"/> | <input type="checkbox"/> |
| Contracts to acquire/dispose of investments other than shares and rental properties | <input type="checkbox"/> | <input type="checkbox"/> |
| Records of cryptocurrency wallet transactions (eg Bitcoin) | <input type="checkbox"/> | <input type="checkbox"/> |
| Work-related deductions | | |
| Details of depreciable assets bought or disposed of during the income year (eg laptops) | <input type="checkbox"/> | <input type="checkbox"/> |
| Details and receipts for home office expenses, including a diary for working at home expenses | <input type="checkbox"/> | <input type="checkbox"/> |
| Details of working from home running expenses and receipts or time sheets | <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) | <input type="checkbox"/> | <input type="checkbox"/> |

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|---|---|---|
| <p>Other deductions</p> <p>Receipts for donations of \$2 and over to deductible gift recipients</p> <p>Expenditure incurred in managing tax affairs (eg tax agent fees)</p> <p>Expenditure incurred in earning interest, dividend and other investment income (eg investment advice fees)</p> <p>Income protection insurance premiums</p> | <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> | <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> |
| <p>Rental properties</p> <p>Date when property was purchased, including details of co-ownership if applicable</p> <p>Period property was rented out during the income year</p> <p>Records detailing rental income (annual statement from property agent, if engaging services of an agent)</p> <p>Loan statements for property showing interest paid for the income year</p> <p>Expenses incurred such as water charges, land tax and insurance premiums</p> <p>Details of depreciable assets bought or disposed of during the income year</p> <p>Details of any capital works on the property</p> <p>If the property was disposed of during the income year, information relating to dates and costs associated with the disposal of the property</p> | <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> | <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> |
| <p>Offsets/rebates</p> <p>Details of any superannuation contributions for spouse</p> <p>Details of dependants, including their age, occupation and income</p> <p>Private health insurance statement (and details of prepaid premiums)</p> | <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> | <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> |
| <p>If operating as a sole trader</p> <p>Cashbook, which includes records of drawings taken before the business takings were banked</p> <p>Copies of Business Activity Statements and/or Instalment Activity Statements lodged for the income year</p> <p>Copies of income statements/PAYG summaries for employees</p> <p>Details of any government grants, subsidies, payments or rebates received</p> <p>Details of superannuation contributions for employees</p> <p>Details of any assets purchased, including date of purchase and amount</p> <p>Payments of salaries and superannuation to associates</p> <p>Records from accounting software (eg trial balance, profit and loss, and balance sheet)</p> <p>Statements of all liabilities of the business</p> | <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> | <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> |

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|--|--------------------------|--------------------------|
| Other information – all individuals | | |
| Details of residency status | <input type="checkbox"/> | <input type="checkbox"/> |
| Other receipts or outgoings received or incurred, where uncertain if assessable/deductible | <input type="checkbox"/> | <input type="checkbox"/> |
| Notice of superannuation contributions | <input type="checkbox"/> | <input type="checkbox"/> |
| Individual's total superannuation balance | <input type="checkbox"/> | <input type="checkbox"/> |