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Personal Tax Return Checklist

Please use this handy checklist to make sure you don't miss out on any allowable deductions and are able to lodge a complete tax return.

Income Checklist

	AMOUNT
Group Certificate(s)	Please supply supporting documents
Interest Received: Account no. & branch BSB no. required	
Other Income: (Dividends, Trust Distributions, other earnings)	
Government Pensions & Allowances:	
Lump Sum & Termination Payments:	
Other Pensions & Annuities:	
Allowances: (e.g. entertainment, car etc)	
Distributions from Partnerships or Trusts:	
Assets Sold: Details of any assets sold that were either used for income earning purposes or may be subject to capital gains tax	
Spouse earnings: Required if a rebate or FTI is claimable	
Self Employment Income:	

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Expense Checklist

	Amount to be claimed
Protective/Compulsory Clothing & Laundry:	
Briefcase/calculator/folder/PDA:	
Self Education (Books, Tutorial Fees):	
H.E.C.S Debt:	
Subscriptions to Trade, Professional or Business Associations:	
Magazine & Newspaper Subscriptions:	
Union Fees:	
Tools of Trade:	
Overtime Meal Allowances:	
Award Transport Allowance Claims:	
Conventions, Seminars & Conferences:	
Income Protection Insurance (excluding death & total/permanent disability):	
Telephone/Fax: Business use only	
Internet Access – Dial up/Broadband	
Mobile: Business use only	
Donations & Gifts to School Building Funds:	
Superannuation: Personal contribution Please provide fund name and membership number	
Tax Agent Fees:	
Interest on Loans to purchase equipment or income earning investments:	
Interest and Dividend Deductions:	
<ul style="list-style-type: none"> ● Account Keeping Fees ● Ongoing Management Fees ● Interest on Borrowings to Acquire Shares ● Advice relating to changing investments (but not setting them up) 	
Interest on Loans to purchase equipment or income earning investments:	
Motor Vehicle Expenses: Business use only	
<ul style="list-style-type: none"> ● Bridge/road tolls (if travelling on business) ● Car Parking (if travelling on business) ● Kilometres completed when travelling for business ● Fuel Expense when travelling on business 	
Motor Vehicle Expenses: If vehicle registered under company name	
<ul style="list-style-type: none"> ● Registration ● Tyres/Batteries ● Repairs & Maintenance ● Interest cost on Loans ● Insurance 	
Home Office Expenses: (expenses incurred at home re business)	
<ul style="list-style-type: none"> ● Cleaning ● Heating/Cooling ● Electricity ● Telephone ● Computer Equipment ● Other Equipment ● Software 	

NOTE: Please ensure work related claims above \$300 can be substantiated.

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Rental/Investment Property Checklist

Rental Income:	
Rental Expenses Total: (please refer table below)	
Advertising for Tenants:	
Body Corporate Fees:	
Borrowing Expenses:	
Cleaning:	
Council Rates:	
Capital Allowances (depreciation):	
Gardening/Lawn Mowing:	
Insurance Expense:	
Interest on Loans:	
Land Tax:	
Legal Fees:	
Pest Control:	
Property Agent fees/commissions:	
Maintenance & Repairs:	
Capital Works (special building write-off):	
Stationery, telephone and postage:	
Water Charges:	
Sundry Rental Expenses:	