

Individual Tax Return Checklist:

Income:

- PAYG Summaries.
- Pensions or Government payment/allowances.
- Interest earned from banks and other building society.
- Dividend Statement.
- Details of rental property income.
- Details of business income.
- Details of any other income earned.

Expenses:

- Work related expenses (Uniform, tools of trade, education, fees etc.)
- Motor vehicle expenses (No. of Kilometres travelled if no logbook maintained otherwise logbook and all relevant expenses).
- Travel expenses (Fares and accommodations).
- Investment Expense.
- Rental Property expense.
- Cost of managing tax affairs.
- Charity / Donation.

General:

- Private Health Insurance details and Tax Statement.
- Spouse Details.