



2019 INDIVIDUAL TAX RETURN CHECKLIST

- Any changes in address or contact details

Income

- Gross salary, wages, allowances, benefits, earnings, tips and directors' fees
- Any change in your occupation
- Income from business activities
- PAYG Payment Summary amounts
- Details of any non-cash benefits received
- Employer lump sum and termination payments. All documentation should be provided including Statement of Termination Payment from the employer or fund/ADF
- Australian Government Allowances and payments, including pensions and Newstart educational Allowances
- Details of any investment sales (eg shares and real estate) including dates of sale & acquisition. Particularly watch out for post 19 September 1985 property, detailing costs and dates thereof.
- Annuities including Account based pensions.
- Australian Superannuation lump sum payments
- Income from trusts and partnerships. Annual Tax Statements should be provided
- Rental income
- Interest and dividends received and any tax deducted. Include details of franked dividends and imputation credits
- Employee Share Scheme statements
- Foreign source (employment and pension) income and details of any foreign tax credits attached to that income

Deductions

- Investment and property income expenses (*carefully detail interest claims*)
- Expenditure records related to a taxpayer's employment, such as work-related motor vehicles (logbook or estimated kms travelled in year), self-education, protective clothing and uniform expenses, travel diary if overnight travel longer than 6 nights (refer to employment fact sheets <https://www.cr.com.au/get-results/tax-checklists/>)
- Donations of \$2 and over
- For self-employed persons and those without employer superannuation support, details of superannuation contributions made
- Tax agent's fees and other accounting and tax audit fees
- Special deductions (Australian films, investment shelters and forestry-type schemes)
- Interest or Dividend deductions

Rebates

- Interest or Dividend deductions
- Any changes in dependants including names and dates of birth (*taxable income of spouse should be provided*)
- Any change in your marital status
- Details of any income received in a lump sum that was accrued in earlier income years (*eg. assessable pensions*)
- Net medical expenses only related to disability aids, attendant care or aged care
- Private Health Insurance statement
- Details of HELP Debt
- Superannuation contribution on behalf of your spouse
- Copy of any payments or allowances from Centrelink



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