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BASIC TAX RETURN CHECKLIST

Need some guidance with preparing your tax return? We have put together a handy checklist of receipts, tax invoices and supporting documents that will assist you with preparing your tax return.

Income:

Pay As You Go (PAYG) summaries. Pensions or government payments/allowances. Interest earned for the financial year. Dividend statements. Details of rental property income.

Other Expenses:

- Tax return fee for the previous year.
- Work-related insurance premiums.
- Rental property expenses (e.g. rates, agent fees, interest on loan, repairs and maintenance, utilities cost, depreciation schedule).
- Investment expenses (e.g. bank fees, financial advisors fees).

Details of any business income.

Details of any other income.

General Expenses



Personal car expenses (logbook and all expenses, or an estimation of kilometres if no logbook kept).

Travel expenses (flights, taxis or public transport for work purposes).



Electronic devices (phone, computer, laptop, etc.) costs for work purposes.

Accommodation expenses while working away from home.





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Self-education expenses for work purposes.

Records of sales and purchase of shares, business or property.

Details of private health insurance.

Spouse and children's details including D.O.B. and any Centrelink benefits.

Details of any government debts. Charity donations.

Aero Group:

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Investment Property:

- Body corporate fees.
- Cleaning.
- Capital allowance (depreciation on plant).
- Interest on loans.
- Legal fees.
- Property agent fees or commission.
- Stationery, postage, telephone expenses.
- Sundry rental costs.
- Advertising costs.

Other Deductions:

Tax agent fees. Superannuation (if self-employed). Receipts of gifts or donations to charity. Financing lease statements Income protection premiums.

Other Useful Information:

Credit card statement.

Borrowing expenses.		Bank account details (name, account number, BSB).
Council rates.		Loan statements.
Gardening expenses.		Previous year's tax return.
Insurance costs.		Previous year's tax losses.
Land Tax		Property agent fees or commission.
Pest control expenses.	\square	Details of government debts (e.g. child support,
Repairs and maintenance fees.		Centrelink).
Capital works deductions.		Amount of Family Tax Benefit received fortnightly.
Travel expenses.		Tax credit vouchers.

- Water expenses.
- Quantity surveyors depreciation report.

Aero Group:

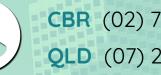
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