

2022 INDIVIDUAL TAX RETURN CHECKLIST



Name of taxpayer:

Address:

Preferred contact no.

Email:

PLEASE ADVISE ANY CHANGE OF NAME, ADDRESS OR CONTACT NUMBERS THAT HAVE OCCURRED DURING THE YEAR.

Information	Information Provided	Not Applicable
Income PAYG payment summaries (e.g. from employers if applicable) Lump sum payments (e.g. employment termination payment) Non-cash benefits Partnership distribution statements, including copy of partnership's tax return Trust distribution statement Documentation re foreign source income, foreign assets or property A summary of interest earned, including for term deposits Dividend statements Employee share scheme statements Managed funds annual tax statement & capital gains tax statement Contracts to acquire/dispose of investments other than shares and rental properties Records of cryptocurrency wallet transactions (e.g. Bitcoin)		
Work-related deductions Details of depreciable assets bought or disposed of during the income year (e.g. laptops), noting the full expensing COVID-19 deduction concessions Details and receipts for home office expenses, including a diary for COVID-19 set rate deduction for working at home expenses Details of working from home running expenses and receipts or time sheets Professional journals/trade magazines Professional memberships/subscriptions Receipts for continuing professional development courses and seminars Receipts for self-education expenses Receipts for other work-related deductions such as protective clothing, uniform expenses, tools and equipment, and travel Vehicle logbook for motor vehicle expenses (if using the logbook method)		
Other deductions Receipts for donations of \$2 and over to deductible gift recipients Expenditure incurred in managing tax affairs (e.g. tax agent's fees) Expenditure incurred in earning interest, dividend and other investment income (e.g. investment advice fees) Income protection insurance premiums		

<p>Rental Property</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>Offsets/rebates</p> <p>Details of any superannuation contributions for spouse</p> <p>Spouse name, DOB, and income details and the number of dependent children</p> <p>Private health insurance statement (and details of prepaid premiums)</p>		
<p>If operating as a sole trader</p> <p>Cashbook or access to fully reconciled accounting software (Xero/MYOB etc.), 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 (e.g. trial balance, profit & loss, and balance sheet)</p> <p>Statements of all liabilities of the business</p>		
<p>Other information – all individuals</p> <p>Details of residency status</p> <p>Other receipts of outgoings received or incurred, where uncertain if assessable/deductible</p> <p>Notice of deductible superannuation contributions</p> <p>Amount of child support payments made</p> <p>Any other information you feel is relevant</p>		

IMPORTANT: THIS DOCUMENT FORMS PART OF OUR WORKING PAPERS. PLEASE COMPLETE AND RETURN

THE ATO REQUIRES ALL REFUNDS TO BE PAID DIRECTLY INTO A BANK ACCOUNT

PLEASE PROVIDE BANK ACCOUNT DETAILS FOR REFUNDS:

Name of Account:

BSB:

Account Number: