

Tax Return Checklist 2019/20

(yes/no/na)

INCOME

- ◆ Payment Summaries (Group certificate) _____
(If your employer was STP registered this will no longer be required and we will access your wages information direct from the ATO)
- ◆ Lump Sum Payment Summaries _____
- ◆ Interest received on bank accounts _____
- ◆ Business income and expenses details _____
- ◆ Shares – Dividend Slips (generally 2/year) (**Paid** between July 19 to June 20) _____
- ◆ **If any existing Investments sold: (shares, Managed Funds etc)**
 - Cost of shares and date purchased _____
 - Sale price and date sold _____
- ◆ Annual Trust Distribution Taxation Statements. _____
- ◆ Rental Property-
 - Income _____
 - Agent Statements _____
 - Loan Statements (Interest) _____
 - Rates _____
 - Body Corporate _____
 - Insurance _____
 - Repairs _____
 - Other Expenses _____

NB: you can no longer claim travel expenses
- ◆ Foreign income details _____
- ◆ Any other income _____

DEDUCTIONS

Car expenses

- ◆ If you travelled **less than** 5,000 work related kms - a reasonable estimate of the number of work related kilometres you travelled during the year and the car details;
or _____
- ◆ If you travelled **more than** 5,000 work related kms - a 12 week logbook plus the date purchased and cost of your car, lease/HP agreements, receipts for rego, insurance, repairs & services, fuel & oil. _____

Travel expenses e.g. Air Fares, Taxis, Parking _____

Uniform and compulsory clothing expenses including purchases, Repairs/alterations, dry cleaning. _____

Self education expenses Course name and University name _____
Travel (km's & engine size of your car) _____
and Accommodation _____
Books _____
Fees _____
Stationery _____
Computer, other equipment _____
Furniture e.g. desk, chair _____

Other work related expenses
Union fees _____
Conference & seminar fees _____
Professional library eg books, journals, trade magazines etc _____
Tools & other equipment _____
Telephone calls _____
New computer & software expenses – and Internet fees. _____
Stationery incl. computer paper & USB's _____
Average hours worked from home each week _____
1 July 2019 to 29 February 2020 _____
1 March 2020 to 30 June 2020 _____

Voluntary Superannuation Contributions

Any Taxpayers can get a deduction for voluntary personal super contributions made
Please provide details of any voluntary contribution you made
and your super fund details _____

Expenses incurred in earning dividend & interest income

Such as bank fees, interest paid on loans used to purchase shares or units. _____

Investment adviser fees _____

Donations over \$2. Including to school building & library funds _____

Income Protection Insurance _____

Any other expenses considered to be eligible tax deductions.
We can discuss these if you have any questions.

OFFSETS

Medical expenses – Are no longer claimable.

Private Health Insurance Annual Taxation Statement from your health fund _____

(Some funds will no longer be issuing statements – For most funds we can access this information direct from the ATO)

Spouse Details (if we are not preparing their tax return)

Full Name, Date of Birth and Income (or copy of tax return) _____

Bank Account details –Your refund has to go directly into your bank account from now on.

BSB: _____ Account Number: _____

Account Name: _____

IF YOU PROVIDE ALL OF THIS INFORMATION, IT CAN SPEED UP THE PROCESSING OF YOUR TAX RETURN.