

# 2023 Individual Tax Return Checklist

Name of taxpayer: \_\_\_\_\_

Address: \_\_\_\_\_

Preferred contact no.: \_\_\_\_\_

Information	Information provided	Not applicable
<b>Income</b>		
Income statement/PAYG payment summaries	<input type="checkbox"/>	<input type="checkbox"/>
Lump sum payments (eg employment termination payment)	<input type="checkbox"/>	<input type="checkbox"/>
Non-cash benefits	<input type="checkbox"/>	<input type="checkbox"/>
Partnership distribution statement, including copy of partnership tax return	<input type="checkbox"/>	<input type="checkbox"/>
Trust distribution statement, including copy of trust tax return	<input type="checkbox"/>	<input type="checkbox"/>
Documentation re foreign source income, foreign assets or property	<input type="checkbox"/>	<input type="checkbox"/>
Bank statements stating interest earned, including for term deposits	<input type="checkbox"/>	<input type="checkbox"/>
Dividend statements	<input type="checkbox"/>	<input type="checkbox"/>
Employee share scheme statements	<input type="checkbox"/>	<input type="checkbox"/>
Managed fund annual tax statement and capital gains tax statement	<input type="checkbox"/>	<input type="checkbox"/>
Buy/sell contract notes for any share transactions	<input type="checkbox"/>	<input type="checkbox"/>
Contracts to acquire/dispose of investments other than shares and rental properties	<input type="checkbox"/>	<input type="checkbox"/>
Records of cryptocurrency wallet transactions (eg Bitcoin)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Work-related deductions</b>		
Details of depreciable assets bought or disposed of during the income year (eg laptops), noting the full expensing COVID-19 deduction concessions	<input type="checkbox"/>	<input type="checkbox"/>
Details and receipts for home office expenses, including a diary for COVID-19 set rate deduction for working at home expenses	<input type="checkbox"/>	<input type="checkbox"/>
Details of working from home running expenses and receipts or time sheets	<input type="checkbox"/>	<input type="checkbox"/>
Professional journals/trade magazines	<input type="checkbox"/>	<input type="checkbox"/>
Professional memberships/subscriptions	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for continuing professional development courses and seminars	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for self-education expenses	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for other work-related deductions such as protective clothing, uniform expenses, tools and equipment, and travel	<input type="checkbox"/>	<input type="checkbox"/>
Vehicle logbook for motor vehicle expenses (if using the logbook method)	<input type="checkbox"/>	<input type="checkbox"/>

Information	Information provided	Not applicable
<p><b>Other deductions</b></p> <p>Receipts for donations of \$2 and over to deductible gift recipients</p> <p>Expenditure incurred in managing tax affairs (eg tax agent fees)</p> <p>Expenditure incurred in earning interest, dividend and other investment income (eg investment advice fees)</p> <p>Income protection insurance premiums</p>	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>
<p><b>Rental properties</b></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><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>
<p><b>Offsets/rebates</b></p> <p>Details of any superannuation contributions for spouse</p> <p>Details of dependants, including their age, occupation and income</p> <p>Private health insurance statement (and details of prepaid premiums)</p>	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>
<p><b>If operating as a sole trader</b></p> <p>Cashbook, which includes records of drawings taken before the business takings were banked</p> <p>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 (eg trial balance, profit and loss, and balance sheet)</p> <p>Statements of all liabilities of the business</p>	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>

Information	Information provided	Not applicable
<b>Other information – all individuals</b>		
Details of residency status	<input type="checkbox"/>	<input type="checkbox"/>
Other receipts or outgoings received or incurred, where uncertain if assessable/deductible	<input type="checkbox"/>	<input type="checkbox"/>
Notice of superannuation contributions	<input type="checkbox"/>	<input type="checkbox"/>
Individual's total superannuation balance	<input type="checkbox"/>	<input type="checkbox"/>