



Tax Return Checklist For Individuals



2018 TAX RETURNS

For the preparation of your 2018 Income Tax Returns;
PLEASE SUPPLY– BSB, ACCOUNT NUMBER & ACCOUNT NAME
PLEASE SUPPLY – Your current E-mail address

- PAYG Payment Summaries from all employers including lump sum payments, termination payments and allowances
- Details of tax-free government pensions
- Distributions from partnerships or trusts
- Details of any assets sold that were either used for income earning purposes or may be caught by capital gains tax (CGT)
- Details of all interest earned on investments
- Dividend Statement for all dividends received during the year including Buy & Sell Contracts
- Foreign income earned, eg. Wages, interest received on bank accounts, foreign pensions
- Any other income earned for the period 1 July 2017 – 30 June 2018
- Rental Property details such as annual statements, income and expense details and investment loan statements
- For a newly acquired rental property please supply;
Quantity surveyors report
Purchase contract and settlement statement
- Details of any work related expenses. The following link may assist you in determining what is deductible: <https://www.ato.gov.au/Individuals/Income-and-deductions/Deductions-you-can-claim/Deductions-for-specific-industries-and-occupations/>
- Details of any donations made
- Interest and dividend deductions
- Interest on loans to purchase equipment or income-earning investments
- Copy of Income Protection Insurance Policies
- Detail of any personal superannuation contributions that are eligible for the government co-contribution or that may be claimable as a deduction.
- Notice of Intent to Claim with letter of acceptance from your superannuation fund where you have made a contribution that is being claimed as a deduction.
- Details of your bank account. Ie. Name of account, BSB number and Account number. Should your return result in a tax refund, the Australian Taxation office will deposit your refund via direct debit. Cheques are no longer issued for payment of income tax refunds
- Annual Private Health Insurance Statement detailing premiums paid.
- Names and Date of Birth for all dependent children.
- Details of your spouse and spouse's income (where applicable)