



Individual Tax Return Checklist

Use this checklist as a reminder. Bring or send only the records that apply to you.

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Income and receipts

- ☐ Income statements or payment summaries for salary and wages, if not available through ATO pre-fill
- ☐ Lump sum and employment termination payments
- ☐ Government pensions and allowances
- ☐ Other pensions or annuities
- ☐ Allowances, including car, tools or entertainment allowances
- ☐ Interest, rent and dividends
- ☐ Partnership or trust distributions
- ☐ Details of assets sold that were used to earn income or may be subject to capital gains tax

Clothing expenses

- ☐ Compulsory or registered uniforms, occupation-specific clothing and protective clothing
- ☐ Laundry, dry-cleaning and repair of qualifying work-related clothing

Other deductions and records

- ☐ Personal super contributions and the fund acknowledgement of your notice of intent
- ☐ Sun protection items
- ☐ Prior-year tax agent fees
- ☐ Work-related telephone costs
- ☐ Tools of trade
- ☐ Gifts or donations to deductible gift recipients

Other work-related expenses

- ☐ Work-related transport allowances
- ☐ Bank charges on income-earning accounts
- ☐ Business-related bridge or road tolls
- ☐ Business-related car parking
- ☐ Conventions, conferences and seminars
- ☐ Work-related decline in value of tools, equipment, library items or computer equipment
- ☐ Motor vehicle expenses for eligible work travel
- ☐ Overtime meal expenses where an eligible allowance was received
- ☐ Union fees
- ☐ Trade, professional or business association subscriptions
- ☐ Professional journals and magazines
- ☐ Income protection insurance, excluding death or total and permanent disability cover

Self-education expenses

- ☐ Course and tutorial fees, excluding HECS-HELP repayments
- ☐ Interest on borrowings used for deductible self-education expenses
- ☐ Stationery and textbooks that are not depreciating assets

Depreciable plant and equipment

- ☐ Books and trade journals
- ☐ Briefcases, luggage or suitcases
- ☐ Calculators or electronic organisers
- ☐ Electronic tablets, software, stationery and tools of trade

Home office expenses

- ☐ Cleaning
- ☐ Cooling and heating
- ☐ Decline in value of office furniture
- ☐ Lighting
- ☐ Telephone and internet

Interest and investment deductions

- ☐ Account-keeping and ongoing management fees
- ☐ Interest on borrowings used to acquire shares or income-producing investments
- ☐ Advice about changing investments, but not their initial establishment
- ☐ Other investment-related costs

Rental property expenses

- ☐ Advertising expenses
- ☐ Council and water rates
- ☐ Insurance, interest and land tax
- ☐ Legal or management fees
- ☐ Genuine repairs and maintenance
- ☐ Telephone expenses and other rental records

Cryptocurrency

- ☐ Your complete tax-ready cryptocurrency transaction report