

Action Tax Services

'Success Starts with Action'



Income Tax Return Checklist- Individuals

This checklist can be used as a guide to bring all relevant information with you to complete your Income Tax Return:

Income

- Payment Summaries
- Lump Sum and Termination Payment Summaries
- Government payment statements, if received
- Interest income from banks and building societies
- Dividend statements for dividends received or reinvested
- Annual Tax Statements from Managed Funds
- Other income:
 - Rental properties
 - Business
 - Foreign income
 - Capital gains
 - Employee share schemes

Deductions

- Work related expenses:
- Motor vehicle
- Travel (fares and accommodation)
- Uniforms/work-wear
- Self-education and professional development
- Union, registrations, tools, subscriptions, memberships
- Home office, seminars, conferences
- Telephone, computer, internet
- Any other costs incurred earning income
- Donations to charities or building funds
- Income protection insurance

Offsets and Refunds

- Health insurance and rebate entitlement statement
- IAS statements or details of PAYG instalments paid
- Spouse details including taxable and exempt income

Tax Refunds – the Tax Office no longer issues refunds by cheque so you must bring your bank account details, including the BSB and Account Number with you to your appointment.

If you have any queries before your appointment please contact our office.

Office:

Shop 18, Moranbah Fair
12-14 St Francis Drive

Postal:

PO Box 318
MORANBAH QLD 4744

P: (07) 4941 7620

M: 0439 416958

E: Stacey@ataxs.com.au

E: Admin@ataxs.com.au

