

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. Please provide ALL supporting documentation.

NO RECEIPT = NO CLAIM (01/07/2023 to 30/06/2024)

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
 - Cryptocurrency
 - Employee share schemes – Portal log-in details: User Name & Password

Deductions

- Work related expenses:
- Motor vehicle
- Travel (fares and accommodation)
- Uniforms/work-wear (COVID-19 PPE)
- 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 (if outside super)

Offsets and Refunds

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

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

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