

# Income Tax Return Checklist **Individuals**

So we can ensure the time spent with your Davidsons accountant is as efficient as possible, please ensure you use this checklist and bring along the relevant information.

## 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 & 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 questions prior to your appointment please contact us on 03 5221 6399 or email us at [info@davidsons.com.au](mailto:info@davidsons.com.au)