



ACCOUNTING - BOOKKEEPING & PAYROLL - LENDING - FINANCIAL PLANNING - INSURANCE

## 2023 INDIVIDUAL TAX RETURN CHECKLIST

MOST INCOME WILL BE SENT TO THE ATO (ACCESSIBLE VIA THE TAX AGENT PORTAL). WE STILL ASK YOU TO PROVIDE AS MUCH AS POSSIBLE AS IT MAY NOT BE AVAILABLE

### INCOME

- STP Income Statement (MyGov) **OR** PAYG Summary
- Services Australia (Centrelink) Payment Summary (incl. JobSeeker, Pensions, Youth Allowance etc.)
- Interest received from Savings (incl. Term Deposits)
- Dividends received on Shares, Managed Investment Tax Statements (*some not issued until October*)
- Pension Income Stream or Annuity Payment Summary
- Employee Share Scheme Payment Summary
- Superannuation Lump Sum PAYG Payment Summary
- Foreign Source Income (incl. Overseas Pensions)
- Lump sum and termination payments (incl. CoInvest, Incolink, Redundancy and ETP Income Statement)
- Partnership and Trust Income
- Any Other Assessable Income

### SEE MORE DETAILED CHECKLISTS FOR:

- Sole Trader Business Income
- Capital Gains Tax (CGT) Consideration (e.g. Sale of Shares, Real Estate, Cryptocurrency)
- Rental / Investment Property Income

### WORK-RELATED DEDUCTIONS

- Work-related Motor Vehicle and Travel expenses (incl. business kilometres, 12-week logbook)
- Work-related Uniform and Protective Clothing
- Work-related Self Education expenses (incl. seminars, course fees (excl. HECS-HELP), books, stationery, travel)
- Subscriptions (union dues, professional membership)
- Home office expenses (incl. diary/log of hours worked)  
**\*WORK FROM HOME DIARY/LOG NOW REQUIRED BY THE ATO\***
- Internet, Printing, Stationery, Renewals (first aid, WWC)
- Work-related Mobile Phone expenses (incl. repairs & purchase) **\*MONTHLY LOG FOR WORK-RELATED % REQUIRED BY ATO\***
- Sun Protection expenses (*if mainly working outdoors*; sunscreen, sunglasses, protective hat)
- Tools & Equipment (*if over \$300 please provide receipt and or date*; laptop, computer, iPads, tools of trade)
- Work-related COVID-19 test expenses

### OTHER DEDUCTIONS

- Additional Superannuation Contributions **FUND INTENT TO CLAIM FORM & ACKNOWLEDGEMENT LETTER REQUIRED PRE-LOGGMENT**
- Income Protection, Life, TPD, Trauma Insurance Notices
- Interest and Dividend expenses (bank fees, margin loan interest, investment magazines, financial planning fees)
- Deductible Donations (*over \$2*) and Tax Agent Fees

### OTHER USEFUL DOCUMENTS OR INFORMATION

- Dependent Spouse Taxable Income
- Dependent Children Details
- Private Health Insurance Tax Statement  
*These will be sent to the ATO by end of July. Some may still issue statement*
- DVA Pension, Defence Force or Sickness Allowance  
Medicare Levy Exemption Certificate
- Home Loan Statements (*for any mortgage health check or have any other enquiries for **Insight Lending***)
- Income Protection, TPD, Life and Trauma Insurance Renewals (*for any **Insight Super & Retirement planning** reviews*)
- Insurance Premium Renewal Notices (*for any quotes or enquiries for **Insight Insurance***)

Please ensure you also provide BSB and ACCT NO for ATO Refunds

NEW CLIENTS: Please ensure you have your TAX FILE NUMBER to provide to reception or your accountant



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