



## 2022/2023 INDIVIDUAL TAX RETURN CHECKLIST

### INCOME:

The tax office will provide us with majority of your income.

- PAYG Payment Summaries, DHHS Income,
- Other pensions and/or annuities;
- Dividend & Interest Income, ESS Income &
- Managed Fund Trust Distributions.

### DEDUCTIONS:

- Tools of Trade (if over \$300 we need date of purchase)
- Professional Memberships & Union Fees
- Travel - work related (include, Tolls, Parking, Accommodation, expenses not reimbursed by work)
- Subscriptions - periodicals
- Training - conferences, seminars
- Internet (work related)
- Computer equipment (including repairs, software, etc)
- Home Office - *refer to separate worksheet*
- Office equipment - calculators, organisers, furniture
- Motor vehicle expenses - *refer to separate worksheet*

### OTHER:

- Private Health Insurance Annual Tax Statement
- Acknowledgement Letter re: claiming Personal Superannuation Contributions

**We encourage you to complete the separate worksheets available**

### MAJOR EVENTS

Please let us know of any significant events that happened to you during the year..... baby, marriage, new home, new investment property, sale of an asset, change of occupation.....

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### WE WILL NEED FROM YOU:

- Rental Income - *refer to our separate Rental Property worksheet*
- Details of any assets sold - Shares, Property &/or Cryptocurrency (*provide the purchase and sale documents*)
- Income Protection claims received
- Stationery items
- Donations
- Telephone (work related) - mobile and % home (if applicable)
- Income Protection Insurance
- Sun protection items (if you work outdoors)
- Tax agent fees (if not ABF Partners)
- Self Education (other than HECS-HELP fees)
- Protective Clothing or Uniform costs
- Interest on loans on investments (shares, managed funds etc)