



2023/2024 INDIVIDUAL TAX RETURN CHECKLIST

INFORMATION WE REQUIRE TO PREPARE YOUR TAX RETURN

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
- Rental Income - *refer to separate worksheet*
- Details of any assets sold - Shares, Property &/or Cryptocurrency (*provide the purchase & sale docs*)
- Income Protection claims received

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*
- Stationery items
- Donations
- Telephone (work related) - mobile & % 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)
- Personal Superannuation Contributions

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.....

.....
.....