

# Income Tax Return Checklist – Individuals

Please use this checklist and bring any relevant information with you as we cannot be sure when the Australian Tax Office Portal will have these details available.

## INCOME

- 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/pensions
  - Capital gains
  - Employee share schemes
  - Cryptocurrency trades
  - Sales of shares
  - Camplify income/Airbnb
  - Ride sharing income

## DEDUCTIONS

- Work related expenses:
  - Motor vehicle
  - Travel (fares and accommodation)
  - Uniforms/work-wear/Covid Tests
  - 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
- Working from home diary of hours

## OFFSETS AND REFUNDS

- 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.

### APPOINTMENT

Office: unit 4, 25-27 Sholl Street, Mandurah. Date: \_\_\_\_\_

Day: \_\_\_\_\_ Time: \_\_\_\_\_

Call us on 9582 9000

**Bain Taxation**  
ACCOUNTING SERVICES

