



TAX + BOOKKEEPING

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CHECK LIST – Income Tax Return 2019

Y N \$

INCOME

PAYG Payment Summaries – Salary or Wages (Allowances, tips, director’s fees etc)			
Government Allowances (Centrelink – Newstart, youth, parenting payments, pensions etc)			
Termination payments / Lump sum payments			
Interest income from bank			
Dividend statements - shares			
Partnership and Trust Income			
Investments and Managed Funds Annual Statement			
Rental Property Annual Statement or Summary of Income & Expenses			
Capital Gains - please provide purchase & selling documents			
Any other income:			

DEDUCTIONS - *To claim a work-related deduction; You must have spent the money yourself and weren't reimbursed; It must directly relate to earning your income; You must have a record to prove it*

Motor Vehicle - log book or up to 5000 Kilometres (0.68c per kilometre)			
Protective clothing - steel cap boots, protective clothing or logoed uniforms			
Sun care protection - sun glasses, hats or sunscreen (working outdoors)			
Safety gear - goggles, gloves, safety glasses, aprons or masks			
Self-Education – study directly related to work at the time			
Telephone & Internet - claim work related percentage			
Home office - 0.52c per hour for gas, electricity, heating & lighting			
Computer / software - printer, repairs, software etc.			
Memberships, subscriptions or union fees			
Police check, ochre card or medical check			
Income protection insurance			
Tools / equipment (under \$300) if over, will be depreciated - need purchase date			
Travel expenses - swag, torch, camping equipment, travel for conferences			
Postage, printing or stationery			
Gifts & donations - registered within Australia & has ABN			
Tax Agent fees - fees you paid to accountant in previous year / travel			

OTHER

Private health details			
Medical expenses – need to be receiving pension. Restricted to disability / age care			
HELP debt / Supplement loan			
Zone offset – main resident must be in zone area			
Spouse name, date of birth & tax file number / dependent children name & DOB			