



Tax Return Checklist

To maximise your deductions and ensure that your tax return is complete, please review the following items and advise us if any apply to you.

Income

- Employment Income (salary / wages)
- Allowances / Tips / Director's Fees
- Employer Lump Sum Payment
- Employment Termination Payment (ETP)
- Centrelink / Pension Income
- Annuities / Superannuation Lump Sum Payments
- Interest & TFN Credits
- Dividends / Imputation & TFN Credits
- Employee Share Schemes
- Partnership & Trust Distributions
- Business Income
- Capital Gains
- Foreign Income
- Rental Property Income

Other Items to Consider

- HELP (Higher Education Loan Program) / HECS
- SFSS (Student Financial Supplement Scheme)
- Child Support Agency Liability
- 20% Net Medical Expenses Offset
- Health Insurance
- PAYG Instalment Credits
- Entrepreneurs Tax Offset
- Other Offsets & Tax Credits
- Reportable Fringe Benefits amount

General Tax Deductions

- Work Related Motor Vehicle Expenses
(Log Book may be required)
- Work Related Travel Expenses
(Travel Diary may be required)
- Work Related Clothing & Laundry Expenses
- Work Related Self-Education Expenses
- Other Work Related Expenses *(see below)*
- Interest & Dividend Deductions
- Gifts & Donations
- Tax Related Expenses
(Includes tax agent fees, and travel to tax appointment)
- Undeducted Purchase Price-Pension / Annuity

Specific Deductions

- Income Protection Insurance
- Union Fees
- Home Office Expenses
- Seminars / Courses / Conferences
- Overtime Meal Expenses
- Briefcase
- Tools & Equipment
- Depreciation on work-related assets
- Calculator / Electronic Organiser
- Computer Costs *(includes repairs & printing costs)*
- Software
- Memberships & Subscriptions
- Telephone / Mobile Phone / Internet
- Bank Fees *(e.g. re deductible purchases)*
- Interest Expenses *(e.g. re deductible purchases)*
- Sun Protection Items *(e.g. sunscreens, safety glasses)*
- Reference Books / Journals / Trade Magazines