Individual Tax Checklist - Basic

Here's a handy checklist to help you collect together all the receipts, tax invoices and supporting documents you'll need to do your tax return.

INCOME

- ❑ PAYG Summaries
- ❑ Pensions or government payments/allowances
- ❑ Interest earned for the relevant year from your banks, building societies etc.
- ❑ Dividend statements
- ❑ Details of rental property income
- ❑ Details of any business income
- ❑ Details of any other income earned

EXPENSES

- ❑ Work related expenses (For example: uniform, tools, education, fees etc.)
- ❑ Motor vehicle expenses (Incl. estimation of Kilometres if no logbook kept, otherwise logbook and all expense items.)
- ❑ Travel expenses
- ❑ Investment expenses (For example: bank fees, financial advisors fees, investment borrowings etc.)
- ❑ Rental property expenses (For example: rates, body corp fees, agent fees, interest on loan, repairs and maintenance, travel, water rates, depreciation schedule, etc.)
- ❑ Cost of managing tax affairs
- ❑ Charity donations

GENERAL

- ❑ Last year's Tax Return
- ❑ Records of sales and purchases of any shares, business or property
- ❑ Private health insurance details
- ❑ Spouse details
- ❑ Children's details including D.O.B and evidence of any Centrelink benefits
- ❑ Details of any government debts (Child support, Centrelink etc.)

NOTES

Don't have an electronic copy? *Use the Etax app to snap a photo of a document then upload it straight to your tax return.*

NOT SURE ABOUT SOMETHING? NO PROBLEM!

Your Etax Accountant will answer any questions you have. Just start your return at **etax.com.au** and send a message using MY MESSAGES at the top of your screen. Alternatively, use the ANY OTHER QUESTIONS section at the end of your return.