


Etax Tax Checklist

My notes



SNAP YOUR RECEIPTS
WITH THE ETAX APP

Retail

 A HANDY CHECKLIST FOR RETAIL EMPLOYEES 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

RETAIL WORK EXPENSES

- Purchase and laundering costs of compulsory uniforms (or items with company logo)
- Protective clothing (aprons, gloves, protective shoes/boots etc.)
- Itemised purchase costs of equipment UP TO \$300 (stationery, diaries,)
- Purchase costs of equipment, used for your job, costing MORE than \$300. (Laptops, samples etc.)
- Association and membership fees
- Repair/maintenance costs of work related tools and equipment
- Interest on loans taken out to purchase work related equipment
- Job related self education expenses (course fees, equipment etc.)
- Accommodation and meal expenses when working/training away from home
- Travel and car expenses
- Home office expenses
- Manuals, catalogues and subscriptions

GENERAL WORK EXPENSES

- Personal car expenses (Estimation of Kilometres if no logbook kept, otherwise logbook and all expense items.)
- Travel expenses (flights, taxis, train and bus fares for training courses, trade fairs etc.)
- Accommodation costs while working away from home
- Phone costs (for work usage)
- Work percentage of computer/laptop expenses (Lease or purchase)
- Work percentage of internet costs
- Home office running expenses
- Work related self education expenses

OTHER EXPENSES AND RECORDS

- Last year's tax return fee
- Income protection insurance premiums (paid outside of Superannuation)
- Rental property expenses (eg: rates, body corp fees, agent fees, interest on loan, repairs and maintenance, travel, water rates, depreciation schedule)
- Investment expenses (For example: bank fees, financial advisors fees, investment borrowings etc.)
- 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.)
- Charity donations

[READ RETAIL TAX BLOG](#)

1300 693 829 | etax.com.au

Please note: Not all employees will be able to claim all the items listed. For advice tailored to your own circumstances, talk to your Etax accountant via [live chat](#) or [my messages](#) in your Etax tax return.

etax
ACCOUNTANTS