

# Etax Tax Checklist



NOT SURE ABOUT SOMETHING? **LIVE CHAT** WITH AN ETAX ACCOUNTANT



SNAP YOUR RECEIPTS WITH THE ETAX APP

## General checklist (for simple tax returns)

 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

### 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, 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

My notes

[READ OUR TAX DEDUCTIONS BLOG](#)

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**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