etax ACCOUNTANTS

TAX CHECKLIST - GENERAL

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

Income

- [ ] Income statements
- [ ] Pensions or government payments/allowances
- [ ] Interest earned for the relevant year from your banks, building societies etc.
- [ ] Dividend statements
- [ ] Details of rental property, capital gains, business or any other income earned

Other Expenses

- [ ] Last year's tax return fee
- [ ] Income protection insurance premiums (paid outside of superannuation)
- [ ] Rental property expenses (e.g. rates, body corp, agent fees, interest on loan, repairs and maintenance, water rates, depreciation schedule)
- [ ] Investment expenses (e.g. bank fees, financial advisors fees, investment borrowings)
- [ ] Records of sales and purchases of any shares, business or property
- [ ] Private health insurance details
- [ ] Spouse and/or 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

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.