

## TAX CHECKLIST - RETAIL WORKERS

- Purchase and laundering costs of compulsory uniforms (or items with company logo)
- Protective items (aprons, gloves, protective shoes/boots etc.)
- Itemised purchase costs of tools and equipment **up to \$300** (stationery, diaries)
- Purchase costs of equipment, used for your job costing **more than \$300**. (Laptops, tablets, samples etc.)
- 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
- Manuals, catalogues and subscriptions
- Travel, car and home office expenses

### 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 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

### Notes

