



Individual Tax Return Checklist - 2015 Financial Year

- Bank account details – BSB & Account Number for deposit of refund if applicable

Income

- PAYG Payment Summary from Employer, Centrelink or any Termination Payments received
- Rental Property – Annual Statement from property agent, receipts for expenses, loan statements
- Dividend Statements
- Managed Fund Annual Tax Statement, Trust Distribution Statement, Partnership Distribution Statement
- Details on the disposal of any capital assets such as Real Estate, Shares or Managed Funds
- Bank Statements stating Interest earned

Expenses

- Records of employment related expenditure:
 - Work related motor vehicle
 - Self-education (study related to work at a recognised educational institution)
 - Protective clothing, tools, uniform, and laundry expenses
- Records for interstate or overseas travel (including receipts and travel diary where applicable)
- Other work related expenses (eg diaries, pens, stationery, home office, tools and equipment, sun protection, union fees, professional journals, subscriptions, courses, seminars)
- Details of depreciable assets bought or disposed of during that are used for work related purposes
- Donations of \$2 and over to Registered Charities
- Tax Agent costs from previous tax year
- Income Protection Insurance statement

Other

- Medical expenses if the total is greater than \$2,162
- HECS/HELP Debts Statements
- Child Support payments for the period 1 July 2014 to 30 June 2015
- Copy of Private Health Insurance Annual Statement for 2015 financial year
- Details of any Employee Share Scheme
- Details of any Superannuation paid on your behalf or contributions for spouse

Please refer to our information on record keeping to ensure your records correctly substantiate your claims.

RECORDS SHOULD BE RETAINED FOR AT LEAST FIVE YEARS AFTER LODGING YOUR TAX RETURN