



Individual Tax Return Checklist – 2019 Financial Year

Income

- PAYG Payment Summary from Employer, Centrelink, Super Fund 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 (log book and receipts / estimate of km)
 - 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, internet, phone, tools and equipment, sun protection, union fees, professional journals, subscriptions, courses, seminars)
- Details of depreciable assets bought or disposed of during the year 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 – (restricted to net eligible expenses for disability aids, attendant care or aged care)
- Copy of Private Health Insurance Annual Statement for 2019 financial year
- Details of any Employee Share Scheme entitlements
- Details of any Superannuation paid on your behalf or contributions for spouse

Notes/Questions

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