

Individual Tax Return - Items to Consider

To maximise your deductions and ensure that your tax return is complete, please review and ensure all applicable information is included when sending your information to us.

Income

- Employment Income – Copies of all PAYG Payment Summaries
- Centrelink Income
- Pension Income
- Employment Termination Payment (ETP)
- Interest Received
- Dividends Received including franking credits
- Partnership & Trust Distributions. If you own managed funds we require the annual tax statements.
- Capital Gains or Losses on disposal of investments
- Rental Property Income & Expenses
- Foreign Income
- Business Income
- Income from the Sharing Economy (Uber or Air BnB)

General Tax Deductions

- Work Related Motor Vehicle Expenses. Log book may be required.
- Work Related Travel Expenses
- Compulsory Work Uniform / Protective Work Wear Expenses
- Work Related Clothing & Laundry Expenses
- Work Related Self-Education Expenses
- Other Work Related Expenses (internet, telephone, mobile)
- Dividend & Interest Deductions
- Gifts & Donations

Specific Deductions

- Income Protection Insurance
- Union Fees
- Home Office Expenses
- Tools & Equipment (Organisers, Computers, Tablets, Briefcases etc)
- Software and Computer Costs
- Seminars
- Overtime Meals
- Memberships & Subscriptions
- Bank Fees
- Interest Expenses
- Sun Protection Deductions

Superannuation

- Details of any salary you sacrificed into Superannuation
- Details of any Superannuation paid for you by your employer in addition to the 9% requirement
- Details of any personal superannuation contributions made in the year ended 30th June 2016, including the notice from the Trustee of your fund advising receipt of your intention to claim.

Other Items to Consider

- HELP & HECS debts
- Details of any child support paid in the year
- Private Health Insurance Statement
- PAYG Tax Instalments Paid
- Any other deductible Tax Related Expenses?