



**McLAREN HUNT**  
FINANCIAL GROUP

## **INDIVIDUAL INCOME TAX RETURN CHECKLIST**

Please use this checklist as a guide and bring any information relevant to your situation:

### **Income**

- ✓ Payment Summaries
- ✓ Lump Sum and Termination Payment Summaries
- ✓ Government payment statements, if received
- ✓ Interest income from banks
- ✓ Dividend statements for dividends received or reinvested
- ✓ Annual Tax Statements from Managed Funds
- ✓ Rental property
- ✓ Foreign income
- ✓ Details of shares sold to assist with Capital gains calculations
- ✓ Employee share schemes

### **Deductions**

- ✓ Work related expenses
- ✓ Motor vehicle expenses or details of kilometres travelled
- ✓ Travel (fares and accommodation)
- ✓ Uniforms/work-wear
- ✓ Self-education and professional development
- ✓ Union, registrations, tools, subscriptions, memberships
- ✓ Home office, seminars, conferences
- ✓ Telephone, computer, internet
- ✓ Any other costs incurred earning income
- ✓ Donations to charities or building funds
- ✓ Income protection insurance

### **Other**

- ✓ Private Health insurance annual statement
- ✓ Details of PAYG instalments paid
- ✓ Spouse details including taxable income

### **Tax Refunds – Did you know?**

The Tax Office no longer issue refunds by cheque so you must bring your bank account details, including the BSB and Account Number with you to your appointment.