Tax Return Checklist 2020

Information Required	Information Provided	Not Applicable
Please provide your bank details for tax refund (if applicable) i.e. BSB, Account No. and Account Name (the ATO has made it mandatory for **ALL** refunds to be deposited into a bank account. ***If you don't supply a bank account, then we are unable to complete your return.***	☐	☐
Income:		
• PAYG summaries from employers, Centrelink and/or Superannuation Funds	☐	☐
• Lump Sum payments (for example Employment Termination Payments)	☐	☐
• Bank Statements & Term deposits detailing interest earned	☐	☐
Income Received from Investments:		
• Details of all CRYPTOCURRENCY transactions	☐	☐
• Managed Fund Annual Tax Statement including Capital Gains Statement	☐	☐
• Dividend Statements including any Buy/Sell contracts for shares	☐	☐
• Receipt of any shares through an Employer Share Scheme	☐	☐
Income Received from Rental Properties:		
• Details of Property sold. ***If you have sold any property please be sure to bring ALL details of the PURCHASE and SALE***	☐	☐
• Annual Statement from Property agent (if engaging the services of an agent) as well as all property expenses paid by yourself	☐	☐
Rental Property:		
• Annual Statement from Property agent (if engaging the services of an agent) including any expenses incurred which are not detailed on the property agent annual statement, such as water charges, land taxes and insurance premiums	☐	☐
• Loan statements for property showing interest paid for the income year	☐	☐
• Period property was rented out during the income year	☐	☐
• Details of depreciable assets bought or scrapped during the year	☐	☐
• Date when property as purchased	☐	☐
• If the property was held by more than one individual please provide details of owners and their legal ownership percentage	☐	☐
If property was disposed of during the income year, information relating to dates and costs associated with the acquisition and disposal of the property (settlement statements from solicitor)		

Work-related Deductions • Details of depreciable assets bought during the year (e.g Laptops) ***including date purchased and cost.*** • Professional Memberships/ subscriptions/ Union fees • Receipts for continuing professional development courses and seminars • Receipts for Self Education expenses • Receipts or evidence of work related deductions such as protective clothing, uniform expenses and travel expenses • Home office expenses • Vehicle Log book for motor vehicle expenses ***if applicable***	☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐
Other deductions : • Receipts for donations of $2 and over to registered charities • Expenditure incurred in managing tax affairs (e.g. tax agents fees) • Expenditure incurred in earning investment income (e.g. interest paid, subscriptions) • Income protection insurance premiums • SUPERANNUATION CONTRIBUTIONS (PERSONALLY) including Fund confirmation letter	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐
OFFSETS AND REBATES • **Details of any super contributions paid for your spouse** **MEDICAL EXPENSES** **<u>THERE IS NO REBATE FOR MEDICAL EXPENSES AND THERE IS NO LONGER A REBATE FOR EXPENSES IN RELATION TO AGED CARE COSTS, ATTENDANT CARE AND DISABILITY AIDS</u>**	☐ ☐	☐ ☐
PRIVATE HEALTH INSURANCE **Please bring in your Health Insurance Statements**	☐	☐
Other information: • If you have any doubt about any income or expenses you've received or incurred bring the documents with you. • Have you made any payments to your superannuation funds that are eligible for the Super Co-contribution? • Have you paid any Child support? • Any other information you think is relevant?	☐ ☐ ☐ ☐	☐ ☐ ☐ ☐