Tax Return Checklist

income

- ◯ Payment Summaries
- ◯ Termination Payment Summaries
- ◯ Government payment
- ◯ Interest income
- ◯ Dividend statements

other income

- ◯ Rental properties
- ◯ Business
- ◯ Foreign income
- ◯ Capital Gains
- ◯ Employee share schemes

deductions

- ◯ Motor vehicle & travel
- ◯ Income protection insurance
- ◯ Uniforms
- ◯ Union & registrations
- ◯ Self-education
- ◯ Working from home
- ◯ Donations

offsets and refunds

- ◯ Health insurance
- ◯ PAYG instalments paid
- ◯ Spouse details & taxable income
- ◯ No of children
- ◯ Child support paid

Notes

TRINITY
ACCOUNTING PRACTICE