

Income

- PAYG payment summary(s)
- Government payments (e.g. Austudy or Newstart allowance)
- Interest (bank and cash management accounts)
- Managed investment annual tax statements
- Share dividends statements
- Family trust distribution
- Foreign source income and foreign assets or property
- Business Income (including copes of all tax invoices issued)
- Employee termination payment summary
- Rental income from investment property(s)
- Other income – e.g. Royalties, scholarships, rural incentives, grants

Deductions

Motor Vehicle

2 methods for claiming motor vehicle travel:

- Cents per Kilometre: requires estimation of total deductible kilometres travelled in car. Limited to 5,000km
- Logbook: requires a logbook to be maintained for a 12 week period

Travel Expenses

- Parking and/or tolls
- Work-related travel: e.g. flights, accommodation, car hire, taxis, food/drinks, public transport

Clothing

- Occupation specific, compulsory, protective and non-compulsory uniform

Insurance

- Income protection insurance
- Professional indemnity insurance

Work-related memberships & associations

- College fees
- Professional associations
- Union dues

Work-related self-education

- Conference / prof development registration fees
- Course & exam fees
- Self-education travel: e.g. flights, accommodation, car hire, taxis, food/drinks, public transport

Home Office/Work from Home

- Computer equipment – hardware and software
- Internet access
- Office furniture and equipment
- Professional library (itemised list of text books you still own that were purchased while studying – include cost and year purchased)
- Stationery, postage, printing, photocopying
- Subscriptions to journals and/or magazines
- Text books, reference material

Other work-related deductions

- Work related apps (for mobiles/tablets)
- Mobile (handset costs and monthly bills)
- Work equipment

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Other deductible expenses

- Bank charges (investment accounts)
- Donations – ATO endorsed
- Interest on investment borrowings
- Tax management advice

Additional documentation

Private health insurance (PHI)

- Annual tax statement detailing how many days you were covered. Please note if you have more than one person listed on your PHI policy (e.g. Spouse), please also provide their annual statement

Work assets

- Details on the sale and/or disposal of any motor vehicles, equipment or furniture

2022 income tax return

- Copy of your 2022 income tax return (if not completed by Us)

Manage funds

- 2022-23 Tax statement

Superannuation

- Superannuation Member's Annual Benefit Statement

Capital Gains

Shares

- Buy and sell contracts
- If the above is inaccessible:
 - Contract date (buy/sell)
 - Total purchase cost
 - Brokerage fees on purchase
 - Total sale proceeds
 - Brokerage fees on sale

Property

- Purchase details:
 - Contract date
 - Settlement statement
 - Legal fees
 - Stamp duty
 - Building/pest inspection costs
 - Other associated purchase costs
- Sale details:
 - Contract date
 - Settlement statement
 - Legal fees
 - Agents commission
 - Other associated sale costs

This checklist is intended as a basic guide only, designed to be used in conjunction with a qualified professional.