

Tax Return Checklist For Individuals



2021 TAX RETURNS

Please supply the following details if updated during the year

Bank Details: _____

Email Address: _____

Contact Number _____

Current Home and Postal Address _____

- PAYG Payment Summaries from all employers including lump sum payments, termination payments and allowances
- Details of tax-free government pensions
- Other pensions and/or annuities, including JobKeeper payments
- Details of any assets sold that were used for income earning purposes that are subject to capital gains tax (CGT)
- Details of all interest earned on investments
- Dividend Statement for all dividends received during the year including Buy & Sell Contracts
- Foreign income earned, eg. Wages, interest received on bank accounts, foreign pensions
- Managed Funds annual tax statement and capital gain tax statement
- Any other income earned for the period 1 July 2020 – 30 June 2021
- Rental Property details such as annual statements, income and expense details and investment loan statements
- For a newly acquired rental property please supply;
 - Quantity surveyors report
 - Purchase contract, legals and stamp duty and settlement statement
- Details of any work related expenses. The following link may assist you in determining what is deductible: <https://www.ato.gov.au/Individuals/Income-and-deductions/Deductions-you-can-claim/>
- Details of any working from home during COVID-19 related expenses. The following link may assist you in determining what is deductible: <https://www.ato.gov.au/General/COVID-19/Support-for-individuals-and-employees/Employees-working-from-home/>
- Details of depreciable assets purchased during the year (laptop, mobile phone etc)
- Details for continuing professional development courses/seminars and self-education expenses
- Details of any donations made
- Interest and dividend deductions such as investment advice fees
- Interest on loans to purchase equipment or income-earning investments
- Copy of Income Protection Insurance Policies
- Detail of any personal superannuation contributions that are eligible for the government co-contribution or that may be claimable as a deduction including a Notice of Intent to claim letter.
- Annual Private Health Insurance Statement detailing premiums paid.
- Names and Date of Birth for all dependent children and details of any child support paid.
- Details of your spouse and spouse's income (where applicable)