



JSM Accounting Group

"With you, through every stage"

INCOME TAX RETURN CHECKLIST – INDIVIDUAL

We have designed a simple checklist to assist with organising standard items used in tax preparation. This is not an exhaustive list but can be used as a guide to help prepare for your tax appointment.

INCOME		
<input checked="" type="checkbox"/>	Item:	Details:
<input type="checkbox"/>	Income Statements – PAYG earners and/or Super Lump Sum	
<input type="checkbox"/>	Lump sum and/or Termination Payment Summaries	
<input type="checkbox"/>	Government Payment Summaries – Single Parent Payment	
<input type="checkbox"/>	Interest earned from Banks and Building Societies	
<input type="checkbox"/>	Dividend Statements for Dividends received or reinvested – shares	
<input type="checkbox"/>	Annual Tax Statements from Managed Funds	
<input type="checkbox"/>	Superannuation Payments – Lump Sums/Income Streams	
Other Income		
<input type="checkbox"/>	Details on Rental Property Income and Expenses (see additional checklist)	
<input type="checkbox"/>	Details on any Business Income and Expenses (see additional checklist)	
<input type="checkbox"/>	Details on any Foreign Income	
<input type="checkbox"/>	Capital Gains – records of sales and purchases of any shares, business, or investment property(s) (see additional checklist)	
<input type="checkbox"/>	Details on any other income earned (Foreign or Domestic)	

EXPENSES		
Work Related Expenses		
<input checked="" type="checkbox"/>	Item:	Details:
<input type="checkbox"/>	Motor Vehicle expenses – Logbook method or Cents per KM method	
<input type="checkbox"/>	Travel – Meals, Tolls, Parking	
<input type="checkbox"/>	Uniforms – PPE, Sunglasses, Hats and Sunscreen, SPF creams	
<input type="checkbox"/>	Tools and Equipment – Under \$300 and Above \$300 (receipts/invoices required)	
<input type="checkbox"/>	Self-education and Professional Development	
<input type="checkbox"/>	Union, Memberships, Registrations and/or Subscriptions	



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Home Office Expenses		
<input type="checkbox"/>	Electricity Costs	
<input type="checkbox"/>	Telephone Costs	
<input type="checkbox"/>	Computer Costs	
<input type="checkbox"/>	Internet Costs	
<input type="checkbox"/>	Subscriptions	
<input type="checkbox"/>	Overtime Meals	
<input type="checkbox"/>	Office Expenses - Supplies	
Other Expenses		
<input type="checkbox"/>	Charity Donations	
<input type="checkbox"/>	Income Protection Insurance	
<input type="checkbox"/>	Tax Agent Fees/Other Accounting Fees	
<input type="checkbox"/>	Additional Super Contributions (Post Tax) or Spousal Contributions	

ADDITIONAL INFORMATION		
<input checked="" type="checkbox"/>	Item:	Details:
<input type="checkbox"/>	Copy of last year's tax return (if not prepared by JSM)	
<input type="checkbox"/>	Private Health Insurance Statement (We usually receive on prefill)	
<input type="checkbox"/>	Spouse details – Full name, DOB, and Income Details	
<input type="checkbox"/>	Children's details – Number of Children	
<input type="checkbox"/>	Details of any Government Debts	
<input type="checkbox"/>	Bank Account Details for any refund – including bank account name, BSB, account number and who the financial institution is	
<input type="checkbox"/>	Child Support Paid	