



Maximise your tax refund and claim(s) with our specialised individual tax checklist

REGULAR INCOME

- Payment Summaries & Income Statements
- Government payment statements (eg newstart)
- Interest income from banks & building societies
- Lump Sum & Termination Payment Summaries
- Dividend statements for dividends received or reinvested
- Annual Tax Statements from Managed Funds

OTHER INCOME

- Business
- Rental properties
- Capital gains
- Foreign income
- Employee share schemes

OFFSETS & REFUNDS:

- Health insurance & rebate entitlement statement
- Spouse details including taxable and exempt income
- Superannuation contributions (not paid by your employer)
- Remote living allowance

GENERAL:

The ATO are expecting to see changes in the vast majority of tax returns for work-related claims over the COVID-19 period. Ensure that you carefully consider (and note) expenses that increased, decreased or ceased altogether, for this financial year or any portion of it. Please note, there are no allowable deductions if you weren't working whilst receiving JobKeeper.

SELF-EDUCATION EXPENSES - WORK RELATED

- Course fees (HECS-HELP fees not included)
- Student union fees
- Tutorial fees
- Textbooks & stationery
- Decline in value of study assets (e.g. laptop)
- Interest on borrowings used to pay for any deductible self-education expenses

Have a question regarding your individual tax return? Get in touch!



OTHER COMMON EXPENSES

- Union fees
- Subscriptions and membership to trade, professional or business associations
- Seminars, conventions & conferences
- Work-related tools & equipment (below \$300)
- Uniform & work specific / protective clothing
- Decline in value of work-related tools & equipment (above \$300)
- Sun protection items
- Telephone / internet expenses
- Overtime meals (in particular circumstances)
- Income protection insurance premiums (excluding death and total/permanent disability)
- Donations
- Any other costs incurred earning income
- Personal super contributions (notice of intent to claim certificate)
- Magazine and professional journal subscriptions

HOME OFFICE EXPENSES

- Internet, Telephone and electricity
- New stationery / printer ink / consumables
- New office furniture & equipment

In some circumstance, hourly rates can be used instead (including during COVID-19 work from home employees). Please discuss with us.

MOTOR VEHICLE EXPENSES - WORK RELATED TRAVEL

- Logbook, fuel, oil & lubricants
- Repairs & maintenance
- Registration Insurance
- Roadside assistance premiums
- Interest on borrowings for work vehicle
- New purchase documents / loan documents
- Lease payments

Or cents p/km travelled: _____
km (up to 5,000km) You need to be able to show that you were required to use your car for work purposes & how you estimated the total kilometres.

TRAVEL EXPENSES

- Bridge / road tolls
- Car parking (not to & from work)
- Meal & accommodation expenses
- Public transport fares
- Car hire fees
- Flights

YOUR ACCOUNT DETAILS

Nominate which account you would like any tax refunds deposited into.

Account Name:

BSB:

Account Number:

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