

# Vik Dhawan

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## Income Tax Return Checklist – Individuals

**Please use this checklist and bring any relevant information with you as we cannot be sure when the Australian Tax Office Portal will have these details available.**

### Income:

- Payment Summaries (we can access these from the ATO, also available through your MyGov account)
- Lump Sum and Termination Payment Summaries
- Government payment statements, if received
- Interest income from banks and building societies
- Dividend statements for dividends received or reinvested
- Annual Tax Statements from Managed Funds

### Other income:

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

### Deductions:

- Work related expenses:
  - Motor vehicle
  - Travel (fares and accommodation)
  - Uniforms/work-wear
  - Self-education and professional development
  - Union, registrations, tools, subscriptions, memberships
  - Home office, seminars, conferences
  - Telephone, computer, internet

### Any other costs incurred earning income:

- Donations to charities or building funds
- Income protection insurance

### Offsets and refunds:

- Health insurance and rebate entitlement statement
- Instalment Activity Statements (IAS) or details of PAYG instalments paid
- Spouse details including taxable and exempt income

***\*Tax Refunds – the Tax Office no longer issues refunds by cheque so you must bring your bank account details, including the BSB and Account Number with you to your appointment. Incorrect bank details will delay your refund for up to 21 days.***