

TAX CHECKLIST

2023 INDIVIDUAL

INCOME:

- Salary or Wages (This will be reported directly to us, so no need for a payment summary)
- Australian Pensions or Annuities (including superannuation)
- Bank Interest earned (This will be reported directly to us)
- Information for Shares (refer to shares and investment checklist)
- Managed Fund Investments (annual tax statement required)
- Capital Gains from investments such as shares or Crypto Currency (buy and sell statements or property (purchase and sale contracts, legal and agents fees paid)
- Rental Property-annual income (statements from real estate agent)
- Distribution from a family Trust or a Partnership
- Foreign Income or Pensions

DEDUCTIONS:

- Car expenses-estimated total kilometers travelled or logbook and total expenses for operating your vehicle (e.g. Fuel, Repairs, Insurance, Registration)
- Work related travel expenses (e.g. accommodation, airfares, taxi fares or meals)
- Uniform expenses (e.g., protective clothing and uniforms purchase or dry-cleaning receipts)
- Self-Education expenses relating to work (e.g., fees, books, stationery, or travel)
- Home office costs relating to work – total hours worked, phone, computer, and software (Refer to Work From Home Record Keeping Spreadsheet)
- Professional membership, subscriptions, and union fees
- Seminars and Conference costs
- Interest expenses on monies borrowed for investments (shares, managed funds)
- Donations to registered charities
- Income Protection Insurance
- Rental Property – Refer to Rental Property Checklist
- Concessional Super Payment (With notice of intent to claim)

TAX OFFSETS:

- Annual tax statement for private health cover (This will be reported directly to us)
- Superannuation contributions to your spouse's fund

Once you have all your documents and would like us to prepare your 2023 Individual Tax Return, please contact our office:

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