CUBE ACCOUNTING
Certified Practising Accountants

Personal Tax Return Checklist

Everything you need to gather for your individual tax return

Tax returns are due 31 October if lodging yourself, or May the following year through a tax agent.

INCOME FROM WORK

- ☐ Finalised Single Touch Payroll (STP) from all employers

WORK-RELATED DEDUCTIONS

- ☐ Vehicle: kilometres travelled or logbook records and all vehicle costs
- ☐ Travel: domestic and international travel for work purposes
- ☐ Uniform: protective clothing, dry cleaning or laundry expenses
- ☐ Self-education: course details and all associated expenses
- ☐ Mobile phone: work-use percentage and total bill
- ☐ Home internet: work-use percentage and total bill
- ☐ Home office expenses: hours worked from home or dedicated office area
- ☐ Tools and equipment purchased for work
- ☐ Books, subscriptions, and professional memberships
- ☐ Computer and technology purchased for work
- ☐ Stationery and printing
- ☐ Seminars and courses
- ☐ Union fees and professional association fees

OTHER DEDUCTIONS

- ☐ Donations and gifts to registered charities
- ☐ Tax agent fees (last year's invoice from your accountant)
- ☐ Superannuation contributions (personal, after-tax contributions)
- ☐ Income protection insurance premiums

INVESTMENTS

- ☐ Bank interest statements
- ☐ Trust distribution statements
- ☐ Managed fund annual investment statements
- ☐ Share dividend statements
- ☐ Buy/sell notes for any share trades during the year
- ☐ Capital gains statement (from broker or financial planner)
- ☐ Interest on borrowings for investments

RENTAL PROPERTIES

- ☐ Total rent received and number of weeks rented
- ☐ Advertising costs
- ☐ Body corporate and strata levies
- ☐ Borrowing expenses and mortgage interest
- ☐ Council and water rates
- ☐ Capital improvement costs
- ☐ Depreciation report (if applicable)
- ☐ Cleaning, gardening, and pest control
- ☐ Land tax and insurance
- ☐ Repairs and maintenance
- ☐ Annual statement from property manager
- ☐ Settlement statement if property was purchased or sold during the year

BUSINESS INCOME (SELF-EMPLOYED / SOLE TRADER)

- ☐ Cash book or invoice records
- ☐ PAYG Instalment and BAS statements
- ☐ Bank statements for the full financial year
- ☐ All business expenses: insurance, rent, wages, contractor payments
- ☐ Business vehicle expenses
- ☐ Materials, tools, advertising, phone and internet

OVERSEAS INCOME

- ☐ Foreign income received and foreign tax paid
- ☐ Foreign rental property income and expenses
- ☐ Foreign investment income
- ☐ Foreign pensions received

FAMILY INFORMATION

- ☐ Spouse's personal details, taxable income, fringe benefits, and investment losses
- ☐ Number of dependent children

OTHER USEFUL INFORMATION

- ☐ Last year's tax return (helpful for comparison)
- ☐ PAYG instalments paid during the year
- ☐ HELP, HECS, or SFSS debt balances
- ☐ Superannuation co-contributions
- ☐ Child support paid by you or your spouse
- ☐ Zone offset information — location and number of days
- ☐ Prior year tax losses

This checklist is a general guide only. Your circumstances may require additional documentation.