

2023 Individual Tax Return Checklist

Name of taxpayer: _____

Address: _____

Preferred contact no.: _____

Information	Information provided	Not applicable
Income		
Income statement/PAYG payment summaries	<input type="checkbox"/>	<input type="checkbox"/>
Lump sum payments (eg employment termination payment)	<input type="checkbox"/>	<input type="checkbox"/>
Non-cash benefits	<input type="checkbox"/>	<input type="checkbox"/>
Partnership distribution statement, including copy of partnership tax return	<input type="checkbox"/>	<input type="checkbox"/>
Trust distribution statement, including copy of trust tax return	<input type="checkbox"/>	<input type="checkbox"/>
Documentation re foreign source income, foreign assets or property	<input type="checkbox"/>	<input type="checkbox"/>
Bank statements stating interest earned, including for term deposits	<input type="checkbox"/>	<input type="checkbox"/>
Dividend statements	<input type="checkbox"/>	<input type="checkbox"/>
Employee share scheme statements	<input type="checkbox"/>	<input type="checkbox"/>
Managed fund annual tax statement and capital gains tax statement	<input type="checkbox"/>	<input type="checkbox"/>
Buy/sell contract notes for any share transactions	<input type="checkbox"/>	<input type="checkbox"/>
Contracts to acquire/dispose of investments other than shares and rental properties	<input type="checkbox"/>	<input type="checkbox"/>
Records of cryptocurrency wallet transactions (eg Bitcoin)	<input type="checkbox"/>	<input type="checkbox"/>
Work-related deductions		
Details of depreciable assets bought or disposed of during the income year (eg laptops), noting the full expensing COVID-19 deduction concessions	<input type="checkbox"/>	<input type="checkbox"/>
Details and receipts for home office expenses, including a diary for COVID-19 set rate deduction for working at home expenses	<input type="checkbox"/>	<input type="checkbox"/>
Details of working from home running expenses and receipts or time sheets	<input type="checkbox"/>	<input type="checkbox"/>
Professional journals/trade magazines	<input type="checkbox"/>	<input type="checkbox"/>
Professional memberships/subscriptions	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for continuing professional development courses and seminars	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for self-education expenses	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for other work-related deductions such as protective clothing, uniform expenses, tools and equipment, and travel	<input type="checkbox"/>	<input type="checkbox"/>
Vehicle logbook for motor vehicle expenses (if using the logbook method)	<input type="checkbox"/>	<input type="checkbox"/>

Information	Information provided	Not applicable
Other deductions Receipts for donations of \$2 and over to deductible gift recipients Expenditure incurred in managing tax affairs (eg tax agent fees) Expenditure incurred in earning interest, dividend and other investment income (eg investment advice fees) Income protection insurance premiums	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Rental properties Date when property was purchased, including details of co-ownership if applicable Period property was rented out during the income year Records detailing rental income (annual statement from property agent, if engaging services of an agent) Loan statements for property showing interest paid for the income year Expenses incurred such as water charges, land tax and insurance premiums Details of depreciable assets bought or disposed of during the income year Details of any capital works on the property If the property was disposed of during the income year, information relating to dates and costs associated with the disposal of the property	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Offsets/rebates Details of any superannuation contributions for spouse Details of dependants, including their age, occupation and income Private health insurance statement (and details of prepaid premiums)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
If operating as a sole trader Cashbook, which includes records of drawings taken before the business takings were banked Copies of Business Activity Statements and/or Instalment Activity Statements lodged for the income year Copies of income statements/PAYG summaries for employees Details of any government grants, subsidies, payments or rebates received Details of superannuation contributions for employees Details of any assets purchased, including date of purchase and amount Payments of salaries and superannuation to associates Records from accounting software (eg trial balance, profit and loss, and balance sheet) Statements of all liabilities of the business	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Information	Information provided	Not applicable
Other information – all individuals		
Details of residency status	<input type="checkbox"/>	<input type="checkbox"/>
Other receipts or outgoings received or incurred, where uncertain if assessable/deductible	<input type="checkbox"/>	<input type="checkbox"/>
Notice of superannuation contributions	<input type="checkbox"/>	<input type="checkbox"/>
Individual's total superannuation balance	<input type="checkbox"/>	<input type="checkbox"/>

