



Checklist for Individual & Sole Trader Tax Returns

2021 (1 July 2020 to 30 June 2021)

Income

- PAYG Summaries
- Pensions or government payments/allowances
- Interest earned for the relevant year
From your banks, buildings societies etc.
- Dividend statements
- Details of rental property income
(EOFY rental statement)
- Details of any business income
- Details of any other income earned
- Cryptocurrency transactions

General Work Related Expenses

- Motor vehicle expenses
 - Logbook and all motor vehicle expenses, if available
 - If logbook not kept, estimated kilometres travelled
 - Fuel, registration, repairs & maintenance, car finance, car purchase invoice, lease statements
- Travel expenses includes flights, taxis, train, cost of travel for training courses and fares attended
- Phone and internet cost (work related use)
- Home office running expenses
- Work related self education expenses

Other expenses and information

- Previous year's tax return fee
- Income protection insurance premiums (outside superannuation)
- Rental property expenses (e.g.: rates, body corp fees, agent fees, interest on loan, repairs and maintenance, water rates, depreciation schedule)
- Investment expenses (bank fees, financial advisors fees, investment borrowings etc.)
- Records of sales and purchases of any shares, business or property
- Children's details including D.O.B and evidence of any Centrelink benefits
- Details of any government debts (Child support, Centrelink etc.)
- Charity donations

