

Checklist for Individual & Sole Trader Tax Returns

07 5668 7111

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

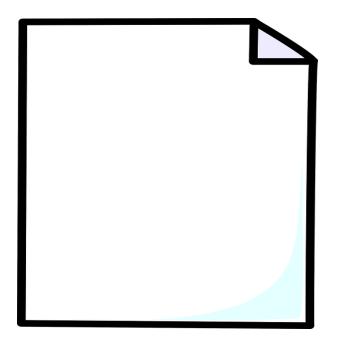
- Motor vehicle expenses
 - Logbook and all motor vehicle expenses, if available
 - If logbook not kept, estimated kilometres travelled
 - Fuel, registration, repairs & maintenance, car finance, car purchase invoice, lease statements
- Travel expenses includes flights, taxis,

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



A Team Tax Accountants Pty Ltd Phone 07 5668 7111 admin@ateamtax.com.au Visit www.ateamtax.com.au PO Box 5856 Q Super Centre Mermaid Waters QLD 4218 ABN 35617544760





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