

Checklist for Individual & Sole Trader Tax Returns

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

