

2023 INDIVIDUAL TAX CHECKLIST

	Information provided	Not applicable
Income from Working/Social Security		
Statement of eligible termination payments (or any rollover payment notification)		
Statement of Government social security pensions or allowance income streams		
Deductions		
Receipts of work-related deductions e.g., Clothing, tools, car, logbook, mobile phone, subscriptions		
Record of hours worked from home (if applicable)		
Receipts of gifts/donations to charities		
Receipts of self-education expenses e.g., Books, computer costs, car expenses		
Last Year's tax fees and any ongoing financial planning advice fees		
Income Protection premiums		
Notice of intention to claim personal superannuation contributions		
Income from investments		
Bank interest and statements		
Trust distribution statements		
Managed Fund investments annual statements		
Share dividend statements		
Buy/sell notes for share trades		
Capital Gains Tax statements		
Tax statements from stockbroker/financial planner		
Royalties		
Cryptocurrency records of acquiring, holding, and disposing		
Deductions from investments		
Interest on borrowing for investment purposes		
Asset purchase/loan agreements		
Asset sale documents		
Income from Overseas		
Foreign salary/wage income received		
Foreign tax paid		
Foreign rental property income and expenses		
Foreign investment income		
Foreign pensions received		
Other useful information		
Credit card statements		
Centrelink and Child Support Agency debts		
HELP, HECS or SFSS debt balances		
Superannuation co-contributions		
Child support paid by you and your spouse		
Private Health Insurance Rebate statement		

If your spouse's tax return is not prepared by this office, please provide the following income details for your spouse as your tax return cannot be lodged without the information being provided on your tax return

	Information provided	Not applicable
Spouse Income Details		
Taxable Income, Reportable Employer Superannuation Contributions		
Reportable Fringe Benefits		
Other exempt pension income		

Your tax return cannot be lodged without the correct information being disclosed. **Note:** the amount of the private health insurance rebate entitlement will vary depending on which income threshold tier the individual falls into – this is based on the individual's income (either as a single or family) and their age. Broadly, singles and families will not be entitled to any private health insurance offset where the income for surcharge purposes is \$140,001 or \$280,001 for singles and families.