

tax2020 INDIVIDUAL TAX RETURN CHECKLIST

Our 2020 checklist is a **general guide** to help you collect the information we need for your individual income tax return. This is not an exhaustive list, so we encourage you to provide any other information you think may help.

Information for you to collect

Please review this list of information we need you to collect for us which may be applicable for your tax return this year:

- What's Your Occupation – please let us know, especially if changed from last year
- Bank Account – details for your refund (BSB and account number)
- Did You Sell Assets - property, shares, etc (sale date + price and purchase date + price)
- Car Expenses (kilometres or logbook, generally not to and from home)
- Protective Clothing, Safety Footwear, PPE, Tools etc. (not provided by employer)
- Union Fees, Subscriptions, Memberships, Registrations
- Mobile Phone (work/business use)
- Computer/Internet (work business use)
- Work-related Self Education Expenses (course fees, travel, accommodation)
- Home Office (electricity, furniture and equipment, telephone, internet)
- Home Office Hours/expenses incurred performing regular work duties from home during COVID-19 (from 1 March 2020)
- Assets >\$300 (e.g. computer, telephone, tools)
- Sun Protection (e.g. sunglasses, hats, sunscreen)
- Tax Deductible Donations
- Financial Advisor Fees
- Sickness and Accident Insurance Premiums (Income Protection)
- After-tax Super Contributions - for yourself for the government's super co-contribution
- After-tax Super Contributions -on behalf of your spouse

Information we access direct from the ATO (when ready*)

As your registered tax agent, we have access to payment summaries (employers, Centrelink etc), interest income, dividends, and other information direct from the ATO, so we can complete your tax return. However, this information is not always up-to-date (especially in July and August), so it's always best to have original documents to cross-check where possible.

- PAYG Payment Summaries (Employer Group Certificates)**
- ETP Summaries**
- Government Payment Statements (if received) **
- Superannuation Contributions – confirmation from your superannuation fund
- Study Support Loan details**
- Private Health insurance and rebate entitlement statement**
- Bank Interest Earned
- Dividend Statements (even if you are dividend re-investing)
- Managed Fund/Trust Annual Tax Statements
- Employee Share Scheme Statements*

***These items should appear on your myGov.*

***You are responsible for the accuracy of the information in your Income Tax Return, so please check this list and give us any relevant information. The ATO may not have all these details available at this time.**