



2022 Individual Checklist

Our services include Tax Returns,
Bookkeeping, Financial Planning,
Mortgage Broking, Asset finance
and much more

INCOME

■ Please provide evidence that is relevant for you:

- Salary or Wages (Income Statement)
- Allowances, Tips, Earnings, Directors Fees
- Employer Lump Sum Payments, Employment Termination Payments (ETP)
- Government Allowances including Youth Allowances, Newstart and Austudy
- Australian Government Pensions and/or Superannuation Income Streams
- Australian Superannuation Lump Sum Payments
- Gross Interest for each account
- Dividends received on Shares and Managed Fund Statements
- Employee Share Schemes
- Distributions from Trusts and/or Partnerships
- Capital Gains (include the sales proceeds and all the costs related to acquiring the asset)
- Crypto Tax Report
- Foreign Source Income
- Rental Property Income – please refer to separate *Rental Property Checklist*
- Any Other Income

DEDUCTIONS

■ Please provide evidence that is relevant for you:

- Motor Vehicle Expenses – please refer to separate *Motor Vehicle Checklist*
- Work-related Travel Expenses
- Work-related Uniform Expenses (including protective clothing)
- Work-related Self-Education Expenses (travel to course, course fees, books & stationery)
- Work-related Expenses (telephone, union fees, tools and equipment, computer, subscriptions, printing & stationery, internet cost, sun protection and any other work-related deductions incurred)
- Costs incurred if you received income from interest and/or dividends eg, interest paid
- Donations (where receipts were given for donations over \$2)
- Last Year Tax Agent Fee
- Income Protection

OTHER INFORMATION

■ Please provide evidence that is relevant for you:

- Private Health Insurance Statement
- Spouse's Income
- Any other documentation that you believe is relevant for your tax (bring it along and we will tell you whether it should be reported or claimed)
- BSB and Account Number (to have refunds paid directly into your bank account)
- A copy of previous year tax return (for new clients only)
- If you want a mortgage health check/review please bring your most recent home loan statement
- If you want a health check on your superannuation and personal insurances please bring your most recent superannuation statement