



PETER RADFORD

ACCOUNTANT | TAX AGENT

Office location
Shop 2
99 – 103 Morayfield Road
Caboolture
QLD 4510

Postal address
PO Box 142
Morayfield
QLD 4506

Phone: 07 5495 4100

Fax: 07 5495 4188

Email: info@radfordtax.com.au

Individual Tax Return Checklist

We can access some of your information through the ATO portal but there is no guarantee it will be available in time for you appointment- make tax time easier by using this checklist and bringing in as much information as possible.

INCOME

- Payment Summaries:
 - Employer
 - Centrelink
 - Superannuation Fund
 - Department of Veterans Affairs
- Interest received from banks and financial institutions
- Lump sum or termination payments
- Dividend statements – received or reinvested
- Rental Income
- Foreign Income
- Trust distributions
- Capital gains for sale of investments
- Employee Share schemes
- Managed funds tax statements

FURTHER OFFSETS

- Spouse taxable & exempt income
- PAYG installments paid
- Health Insurance & rebate entitlement statement

NEW CLIENTS

- Bank Details
- Previous Year Tax Return (where possible)

DEDUCTIONS

- Work related expenses:
 - Motor vehicle (logbook, receipts)
 - Uniforms/ laundry/ protective clothing
 - Travel Expenses
 - Union fee, registrations, subscriptions, memberships
 - Telephone, computer, internet
 - Other work-related expenses
- Investment expenses:
 - Bank Fees
 - Financial Advisor Fees
 - Dividend deductions
 - Interest on investment borrowings
- Rental properties:
 - Rates
 - Interest
 - Body corporate fees
 - Rental Management fees
 - Repairs and Maintenance
 - Depreciation Schedule
 - Insurance
 - Tax agent fees (from prior year)

PLEASE NOTE:

This checklist has been designed for individual income tax returns with straight-forward tax preparation needs. Each individual's situation may vary and this list is not exhaustive so please contact the office if you have any queries. It is always better to have more information with you at your appointment than not enough.