

# 2021 Checklist



## Individual Tax Return

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### Income

- PAYG Payment Summaries (Group Certificates) OR STP Income Statements \*\*NEW\*\*
- Government or Centrelink Payments including Pensions, Sickness Benefits, Parenting Payments, Newstart, Austudy and Youth Allowances
- Interest Received from Savings (Term Deposits, Bonus Saver Account, etc)
- Dividends received on Shares and Managed Fund Statements
- Pension or Annuity Payment Summaries (Group Certificates)
- Foreign Source Income
- Lump Sum and Termination Payments - All documentation should be provided including an ETP Payment Summary from the Employer or Fund
- Details of any Capital Gains Tax Asset Sales (eg. Shares and Real Estate). Please include dates of, and costs associated with, Acquisition and Disposal.
- Income from Trusts and Partnerships (Distribution Statements)
- Rental Property Income (refer to the Rental Property Checklist on our Website)
- Any Other Income

### Deductions

- Work related Travel and Motor Vehicle Expenses (Business Kilometres, Logbook)
- Work related Protective Clothing and Uniform Expenses
- Work related Self Education Expenses (eg. Course fees, Seminars, Conferences, Books, Stationery and Travel to the Course)
- Subscriptions (Union Membership, Professional Body Membership, Licensing)
- Donations of \$2 and over (School Building Fund Donations, Library Trust)
- Tax Agent's Fees
- Interest and Dividend Expenses (Bank fees, Margin Loan Interest, Investment Magazine Subscription, Financial Planning Fees)
- Income Protection, Life, TPD, Trauma Insurance Renewal Notices
- Sun Protection expenses (if mainly working outdoors - Sunscreen, Sunglasses, Hat)
- Tools & Equipment, New Assets (eg. Computer, iPads, Laptop Lease)
- Work related Mobile Phone & Internet Expenses
- Printing and Stationery Expenses

### Other

- Private Hospital Insurance Statement**
- Dependent Children Details (full name, date of birth, taxable income if working)
- Dependent Spouse Taxable Income
- Any eligible medical expenses (disability aids, attendant or aged care ONLY)
- HECS, HELP, SFSS and PELS Debt Statement
- DVA Pension & Defence Force Medicare Levy Exemption Certificate
- Medicare Levy Exemption Letter
- Superannuation Fund Intent to Claim Form and Acknowledgement Letter
- Superannuation Statements and Records
- Plus any other document(s) you believe may be helpful in tax preparation
- BSB and Acct No for all Refunds**

### Notes

**Please Note:** To ensure you obtain the maximum deductions you are entitled to, and in consideration of the penalty provisions, full details of any claim should be provided and supporting documentation made available to our accountants, including receipts, tax invoices, dockets, logbooks, diary notations or reasonable and supporting estimates.  
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Private Health Insurance statements will now be sent directly to the ATO by mid-August at the latest. All providers are not required to issue any annual statements for the 2021 income tax year.