Gibson Accounting

Contact Gibson Accounting to arrange your tax return appointment today!

Telephone: (03) 5176 2031

Individual Tax Return Checklist

Please collect your receipts, tax invoices and documents for the items below

INCOME

- PAYG Payment Summaries
- Centrelink income *(excluding family tax benefits)*
- Bank Interest
- Dividend Statements
- Details of rental property income
- Details of any business income
- Details of any other income earned

GENERAL

- Private health insurance statement
- Spouse details
- Records of sales and purchases of any shares, business or property
- **Bank Details for Refunds to be deposited.**

EXPENSES

- Work Related Expenses
  For example: *uniform, tools, union fees etc.*
- Motor Vehicle Expenses
  Logbook showing Kilometres travelled for work and all expense items. An estimation of Kilometres if no logbook kept
- Work related travel expenses
- Rental Property Expenses
  For example: *rates, body corp fees, agent fees, interest on loan, repairs and maintenance (inside and out), water, rates, depreciation schedule, etc.*
- Income Protection Insurance
- Donations to registered charities

NOTES