

Checklist for Individual Tax Return

Employment Details

- Payment Summary/Income Statement details:
 - Salary and wages
 - Allowances
 - Reportable fringe benefits
 - Reportable employer superannuation contributions
 - Lump sum payments (A, B, D, E)
- Employment termination payments (ETPs)
- Motor Vehicle Expenses (if applicable):
 - Usage for work purposes
 - Ownership or lease details
 - Log book availability
- Work-related Expenses:
 - Travel expenses
 - Clothing, uniform, laundry, protective gear
 - Self-education expenses
 - Other work-related deductions

Investments

- Dividends received (including franking credits)
- Capital gains or losses from the sale of assets (property, shares, etc.)
- Rental property details (if applicable)
- Interest earned, including bank and ATO overpayments
- Managed fund distributions

Government Payments

- Details of any government payments received during the year:
- Jobseeker payment
- Youth allowance
- Sickness allowance
- Austudy/Abstudy allowance
- Other government payments

Retirement Contributions

- Personal superannuation contributions:

- Notification to fund for tax deduction
- Concessional contributions cap

Other Income

- Any other sources of income, including:
 - Life insurance policy or friendly society proceeds
 - Forestry managed investment scheme income
 - Scholarships
 - Royalties
 - Assessable income from personal services entity (PSE)
 - Disposal of cryptocurrency
 - First home super saver (FHSS) released amount

Deductions and Offsets

- Deductible donations and gifts (over \$2)
- Fees paid for managing tax affairs
- Eligibility for various tax offsets based on adjusted taxable income

Health Insurance

- Private health insurance details
- Medicare levy reduction or exemption eligibility
- Medicare levy surcharge implications (if no private health insurance)

Miscellaneous

- Outstanding HELP, TSL, or SFSS debt
- Review of related party transactions (distributions, dividends, interest, rent)
- Identification of any carried-forward losses (capital and revenue)