

2020 INDIVIDUAL TAX RETURN CHECKLIST

2020 Individual Tax Returns: Basic checklist

Individual income tax returns

Name of taxpayer:	
Address:	
Contact number:	

Client records required	Information provided	Not applicable
Bank account name, number and BSB (if new client or if account details have changed)		
Bank statements (including any issued by a building society or credit union)		
Car expenses details (including logbook and invoices if required)		
CGT statement (or details of any asset sales during the year including dates of acquisition and disposal, cost base items and capital proceeds)		
Copies of contract notes relating to the disposal of CGT assets including real estate, shares and units		
Copies of invoices for rental expenses (e.g. advertising costs, body corporate fees, borrowing expenses, capital works (including any quantity surveyor's depreciation report), cleaning costs, depreciation schedule, gardening and maintenance expenses, insurance, interest, land tax, legal fees, postage, rates, stationery and security costs)		
Rental statements (including any agent's commission and details of the date the property was rented during the income year)		
Trust distribution statements		
Dividend statements (including any dividend reinvestment plan or share buyback details)		
Insurance policies (including any income protection insurance premiums)		
Managed funds statements		
Acknowledgement letter from Super Fund relating to Notice of intention to claim personal superannuation contributions (if applicable)		
Partnership distribution statement		
PAYG Payment Summary/Income Statement (only if you received a hard copy – information generally available via ATO)		
Private health insurance statement (only if you received a hard copy – information generally available via ATO)		
Receipts and invoices for work-related expenses (e.g. union fees, subscriptions, protective clothing, safety boots, employer uniforms, tools of trade, self-education costs)		
Statement of income received in respect of life or income protection insurance policies and friendly society bonds		
Diary of working from home hours (especially from 1 March 2020 due to COVID-19)		