

# 2023 INDIVIDUAL TAX RETURN CHECKLIST

# 2023 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)		
PAYG Payment Summary/Income Statement (only if you received a hard copy – information generally available via ATO)		
Evidence of bank interest earned		
Dividend statements (including any dividend reinvestment plan or share buyback details)		
Managed funds statements		
Trust distribution statements		
Partnership distribution statements		
Rental statements (including any agent's commission and details of the date the property was rented during the income year)		
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)		
Statement of income received in respect of life or income protection insurance policies and friendly society bonds		
Car expenses details (including logbook and invoices if required)		
Receipts and invoices for work-related expenses (e.g. union fees, subscriptions, protective clothing, safety boots, employer uniforms, tools of trade, self-education costs)		
Diary of working from home hours <b>Please note a detailed diary of work from home hours is required to be able to claim</b>		
Acknowledgement letter from Super Fund relating to Notice of intention to claim personal superannuation contributions (if applicable)		
Income protection Insurance premiums paid (if applicable)		
Private health insurance statement (only if you received a hard copy – information generally available via ATO)		
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 <b>Please note this includes any cryptocurrency trading</b>		