

2024 TAX RETURN CHECKLIST

Bring this information to your 2024 tax interview

INCOME

Applicable to me

	Yes	No
Salary and wages _____	()	()
Any other income including: _____		
• other allowances, benefits, earnings, tips, directors fees etc _____	()	()
• kilometre reimbursement for car expenses _____	()	()
Eligible termination payments _____	()	()
Newstart, Sickness or other Australian Government allowances _____	()	()
Australian Government pensions and other allowances _____	()	()
Other Australian pensions or annuities _____	()	()
Personal services income _____	()	()
Interest _____	()	()
Dividends (amounts of franked, unfranked and imputation credits needed) _____	()	()
Income from partnerships and/or trust _____	()	()
Net income or loss from business _____	()	()
Net farm management deposits or withdrawals _____	()	()
Sale of shares or real estate (other than place of residence) _____	()	()
Foreign income _____	()	()
Rental income _____	()	()
Bonuses from life assurance or friendly society policy _____	()	()
Other income including shares/ rights from an Employee Share Acquisition Scheme (after 12/5/09) _____	()	()
Other income including compensation and insurance payments _____	()	()

DEDUCTIONS

Work related car expense claims: (please complete a travel diary & bring to interview) _____	()	()
Other work related travel expenses: (airfares, meals, accommodation, parking, tolls, fees etc) _____	()	()
Uniform/protective clothing expenses & dry cleaning _____	()	()
Self education expenses:		
student union fees _____	()	()
stationery _____	()	()
text books/journals _____	()	()
course fees _____	()	()
photocopying _____	()	()
travel _____	()	()
telephone _____	()	()
Other expenses: (* See diary pages)		
* Home office hrs (complete home office use diary).		
Work at home from 1st July 2023 actual hours must be recorded in your diary _____	()	()
* Home office equipment and furniture purchased during year (include date purchased and amount)		
telephone/mobile telephone (please complete telephone diary) _____	()	()
tools and equipment _____	()	()
subscriptions & union fees _____	()	()
journals, periodicals, books _____	()	()
undocumentable expenses (please complete undocumentable diary) _____	()	()
expenses in relation to allowances _____	()	()
seminars and conferences _____	()	()
(Please note – For energy, mobile home phone and internet expenses you must keep one monthly or quarterly bill)		
Income Protection Insurance _____	()	()
Interest & dividend expenses _____	()	()
Superannuation Full name of fund: _____	()	()
Fund ABN: _____ Policy No. _____ Amount contributed \$ _____		
Gifts of \$2 or more to eligible funds _____	()	()
Expenses relating to rental income _____	()	()

TAX OFFSETS

Invalid & invalid carer _____	()	()
Senior & pensioner offset & self funded retirees _____	()	()
Annuity & superannuation income stream _____	()	()
Superannuation contributions - on behalf of spouse _____	()	()
Zone or overseas forces _____	()	()
Private health insurance _____	()	()

