



## INFORMATION REQUIRED

Please check the following and upload along any relevant statements, accounts, receipts, etc., to help us prepare your tax return.

### INCOME / RECEIPTS

- ☐ Payment summaries for salary and wages (if provided by your employer(s))
- ☐ Lump sum and termination payments
- ☐ Government pensions and allowances
- ☐ Other pensions and/or annuities
- ☐ Allowances (e.g., entertainment, car, tools)
- ☐ Interest, rent and dividends
- ☐ Distributions from partnerships or trusts
- ☐ Details of any assets sold that were either used for income-earning purposes or which may be liable for capital gains tax ('CGT')

### OTHERS

- ☐ Superannuation contributions
- ☐ Sun protection items
- ☐ Tax agent fees
- ☐ Telephone expenses (business)
- ☐ Tools of trade

### EXPENSES / DEDUCTIONS

- ☐ Award transport allowance claims
- ☐ Bank charges on income-earning accounts (e.g., term deposits)
- ☐ Bridge/road tolls (travelling on business)
- ☐ Car parking (when travelling on business)
- ☐ Conventions, conferences and seminars
- ☐ Depreciation of library, tools, business equipment (incl. portion of home computer)
- ☐ Gifts or donations

### RENTAL PROPERTY EXPENSES

- ☐ Advertising expenses
- ☐ Council/water rates
- ☐ Insurance
- ☐ Interest
- ☐ Land tax
- ☐ Legal expenses/management fees
- ☐ Genuine repairs and maintenance
- ☐ Telephone expenses

### HOME OFFICE EXPENSES

- ☐ Cleaning
- ☐ Cooling and heating
- ☐ Depreciation of office furniture
- ☐ Lighting
- ☐ Telephone and internet

### INTEREST AND DIVIDEND DEDUCTIONS

- ☐ Account keeping fees
- ☐ Ongoing management fees
- ☐ Interest on borrowings to acquire shares
- ☐ Advice relating to changing investments (but not setting them up)
- ☐ Interest on loans to purchase equipment or income-earning investments
- ☐ Motor vehicle expenses (business/work related)
- ☐ Overtime meal expenses

## COMMON INDIVIDUAL CLAIMS

The following outlines common types of deductible expenses claimed by individual taxpayers, such as employees and rental property owners

### CLOTHING EXPENSES

- ☐ Compulsory (or non-compulsory and registered) uniforms, and occupation specific and protective clothing
- ☐ Other expenses associated with such workrelated clothing, such as dry cleaning, laundry and repair expenses.

### SELF-EDUCATION EXPENSES

- ☐ Course fees (but not HECS-HELP fees), student union fees, and tutorial fees
- ☐ Interest on borrowings used to pay for any deductible self education expenses.
- ☐ Stationery and text books (i.e., those which are not required to be depreciated).

### OTHER WORK-RELATED EXPENSES

- ☐ Union fees
- ☐ Subscriptions to trade, professional or business associations
- ☐ Magazine and professional journal subscriptions
- ☐ Seminars and conferences; and income protection insurance (excluding death and total /permanent disability).

### DEPRECIABLE PLANT

- Income- producing assets costing \$300 or less
- ☐ Books and trade journals
  - ☐ Briefcases/luggage or suitcases
  - ☐ Calculators or electronic organisers
  - ☐ Electronic tablets
  - ☐ Software
  - ☐ Stationery
  - ☐ Tools of trade

