

This checklist will assist you in supplying the records and information needed to complete your tax return for 2023.

INCOME

- Payment summaries
- Superannuation lump sums
- ETP payment summaries
- Government pensions and allowance payment summaries
- Interest received or reinvested
- Dividends received or reinvested
- Partnership/trust income
- Managed funds statements
- Employee Share Scheme details
- Business income and expenses and GST information (if applicable)
- Rental property income and expenses – *see website for rental schedule*
- Capital Gains Tax information (eg. shares, investment property, vacant land)
- Any other income including foreign source income

DEDUCTIONS

- Last year's tax return
- Gifts/donations
- Self-education – relevant to your occupation
- Seminars
- Tools and equipment
- Uniforms
- Work related travel

Personal Tax Return Checklist 2023

Name: _____

- Telephone
- Subscriptions
- Union fees
- Income protection
- Work related car expenses – please provide logbook
- Super contribution letter from fund if claiming as a deduction
- Any other deductions

Note: if your total deductions exceed \$300.00, you must have receipts

TAX OFFSETS

- Private Health Insurance statement
- **The low and middle income tax offset for 2023FY is no longer available**

OTHER INFORMATION TO PROVIDE

- PAYG tax instalments
- Taxable Payments Annual Report
- Spouse's taxable income (if not being prepared by us)
- Tax-free Government pensions received, and any Child Support payments made by you
- Up-to-date contact details
- Bank account details for refund