

## My tax return checklist



- |   |   |
|---|---|
| <input type="checkbox"/> Employer payment summary   | <input type="checkbox"/> Gift and donation tax receipts above \$2                 |
| <input type="checkbox"/> Work related travel and technology expenses (including internet & mobile phone expenses) | <input type="checkbox"/> Interest earned on bank accounts, shares and investments |
| <input type="checkbox"/> Work related clothing, laundry and dry cleaning expenses                                 | <input type="checkbox"/> Interest and dividend deductions                         |
| <input type="checkbox"/> Other work related expenses  | <input type="checkbox"/> Rental return from investment property                   |
| <input type="checkbox"/> Work related motor vehicle KM's  | <input type="checkbox"/> Expenses related to owning Investment property           |
| <input type="checkbox"/> Self education expenses  | <input type="checkbox"/> Other deductions   |
| <input type="checkbox"/> Cost of managing tax affairs   | <input type="checkbox"/> Spouse's income (required for various tax offsets)       |
| <input type="checkbox"/> Private health insurance statements  | <input type="checkbox"/> EFT details (for refund purposes)                        |

Please note:

Deductions must be claimed in the financial year you made the purchase

You cannot claim an expense you have been re-imbursed for by your employer

You must have evidence, such as a receipt as proof of your purchase

You must have a Tax File Number (TFN). This is your number for life

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