

# 2023 INDIVIDUAL TAX RETURN CHECKLIST

To maximise your deductions and ensure that your tax return is complete, please review the following items and provide to your Accountant if any apply to you.

## ATO WILL PROVIDE US

- Salary and Wage income *(in most cases)*
- Taxable Centrelink payments *(Job Seeker, Pensions, Parenting payment)*
- Interest, dividends, managed funds *(will compare with your info)*
- Private Health Fund Information
- Superannuation Deduction *(if you have correctly lodged a notice of intent to claim)*
- Notice if you have Crypto, Property or Share Sales *(but you will need to provide us full details)*

## ITEMS WE MAY NEED FROM YOU:

### INCOME

- Interest or Dividend Income *(Statements)*
- Capital Gains / Losses – Property / Shares
- Employee Share Schemes
- Partnership + Trust Distributions
- Business (ABN) Income *(inc details of GST regn)*
- Income from Uber Driving, AirTasker etc
- Foreign Income / Foreign Pensions
- Rental Property (or AirBnb) Income
- Backpay *(or Lump sum payments in arrears letter)*
- Crypto tax report *(essential if you hold this type of investment)*
- Any other income you have received from any source

### OTHER ITEMS TO CONSIDER

- Spouse (or De Facto) income estimate
- Child Support – amount you paid during the year
- Last payslip for the financial year *(handy if you are paid allowances)*
- New clients *(copy of last year's tax return may be required)*



### GENERAL TAX DEDUCTIONS

- Uniforms, Protective Clothing, Boots, Sunglasses, Sunscreen, Gloves, Safety Glasses
- Union Fees, Subscriptions, Work licenses, Resources, Stationery
- Seminars / Courses / Conferences / Self Education
- Working from Home expenses + diary from 1/3/23
- COVID Tests – PCR and RAT
- Tools + Equipment
- Overtime Meal Expenses *(and meal allowance details)*
- Overnight travel allowance details
- Telephone / Mobile Phone / Internet
- Income Protection Insurance
- Work Related Motor Vehicle c/km claims *(if claiming up to 5000 kms please have something that shows how you calculated the kms – diary etc)*
- Work Related Motor Vehicle – other *(summary of fuel, repairs, insurance, rego etc, odometer reading at 30 June + log book if required)*
- Donations to registered charities
- Superannuation Contributions



### MJM Accountants

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