



**GreenhalghPickard**

SOLICITORS AND ACCOUNTANTS

**Airlie Beach | Caloundra | Coolum Beach | Kawana**

## TAX RETURN CHECKLIST

### INCOME

- Ensure PAYG Payment Summary is issued by Employer
- Centrelink pensions & allowances
- Superannuation lump sum payments
- Eligible Termination Payments
- Bank Interest  
(All including term deposits)
- Share dividend statements
- Managed Fund Income Statements
- Capital Gains - Sale of Property, Shares  
(provide Buy & Sell Contracts, Settlement Statements)
- Rental Property Income
- Insurance Payouts

### OFFSETS & OTHER

- Private Health Insurance Rebate
- Superannuation Contributions for yourself or spouse
- Family Tax Benefits
- Spouse/Invalid Rebates

### DEDUCTIONS

- Motor Vehicle  
(km's travelled for work (logbook))
- Work Related Travel
- Uniforms & Laundry
- Self education expenses - TAFE or Uni
- Work Related Deductions -  
(Tools & equipment, Union Fees, Mobile Phones, Computer etc)
- Working from Home expenses
- Seminars Attended
- Sun Protection
- Work Related registration & Licenses
- Interest & dividend Deductions  
(Broker Fees, Loan interest, Seminars, Programs etc)
- Donations
- Tax Agent Fees & travel
- Rental Property Expenses
- Income Protections Insurance

### TAX REFUNDS

**Reminder to bring your account details, including the BSB and account number with you to your appointment.**

For all your tax questions, call us on (07) 5444 1022