



TAX

CHECKLIST

Income

PAYG Summaries are now available to us directly via the ATO.

- Personal Services Income & Business Income (Sole Trader)
 - Income from Trusts or Partnerships
 - Dividends Received (Shares or Managed Fund Statements)
 - Rental Income
 - Foreign Income
 - Other Unreported Income
 - Lump Sum or Termination Payments
 - Capital Gains Tax Assets (Sale of Shares, Real Estate or Cryptocurrency)
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Deductions

- Work-related travel (KMS Travelled/Logbook)
- Work Related Clothing and Protective Clothing
- Working from Home Expenses (Home Office or Working from Home)
- Work Related Self Education (Course, Online Seminars, books)



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Deductions

Work Related Phone Expenses (Work related % required by ATO)

Tools and Equipment

Donations, Union fees or Professional Memberships

Interest or Dividend Expenses

Work Related Travel Expenses

Additional Super Contributions

Licenses or Registrations required for work

Rental Property Expenses

Income Protection Insurance

Offsets

Private Health Insurance Rebate

Superannuation Contributions

Spouse Taxable Income or children details if relevant