



2023 Income Tax Return Checklist - Individuals

INCOME

- Payment Summaries and Income Statements (*provided via myGov*)
 - Lump Sum and Termination Payment Summaries
 - Government payment statements, if received
 - Interest income from banks and building societies
 - Dividend statements for dividends received or reinvested
 - Annual Tax Statements from Managed Funds
- Other Income:**
- Rental properties
 - Foreign income
 - Capital gains (please include dates of/costs associated with acquisition/disposal)
 - Employee share schemes

REBATES

- Health insurance and rebate entitlement statement
- Details of income received in a lump sum which was accrued in earlier income years (e.g. assessable pensions).
- HECS-HELP Debt details

DEDUCTIONS

- Work related expenses:**
- Motor vehicle
 - Travel (fares and accommodation)
 - Uniforms/workwear
 - Self-education and professional development
 - Union, journals, tools, subscriptions and memberships
- Other Expenses:**
- Home office, seminars, conferences
 - Hours worked from home diarised
 - Telephone, computer, internet
 - Any other costs incurred earning income
 - Donations to charities or building funds
 - Income protection insurance
 - Super contributions notice of intent

TAX REFUNDS

- The Tax Office no longer issues refunds by cheque so you must bring your bank account details, including the BSB and Account Number to your appointment.

CAN'T MAKE AN APPOINTMENT? Upload your key documents via our client portal:
www.smnland.com.au/client-portal

Book Now

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