

INDIVIDUAL TAX RETURN CHECKLIST 2021

INCOME	DOCUMENTS REQUIRED	PROVIDED (Y/N)
Salary & wages	PAYG payment summaries from all your employers. You may need to access your payment summary through your MyGov account, if your employer uses Single Touch Payroll	
Centrelink payments or pensions	Details of any Government payments (excl Family Tax Benefit)	
Eligible termination payments (ETP)	ETP payment summary	
Interest income	Bank, Building Society, Credit Union and/or term deposit statements	
Dividend income	Dividend statements	
Managed funds or trust distributions	Annual tax distribution summary statement, including any Capital Gains Statements	
Foreign income	Bank statement or foreign investment reports	
Rental property, including Airbnb	Real estate agent reports, loan statements, expense statements (council rates, water, insurance, repairs etc.) & quantity surveyor depreciation reports	
Capital gains	Asset purchase and sale documents/settlement statements. Note that the ATO now has details of property sales, ASX share transactions, Airbnb, Cryptocurrency transactions	
Any other income	Any additional documents. eg. royalties, compensation from banks & insurers following Royal Commission	
DEDUCTIONS	DOCUMENTS REQUIRED	PROVIDED (Y/N)
Motor vehicle expenses	Total business Km's travelled, including make of car used and/or log book details and all associated running costs, car ownership details, plus information of how the vehicle was used for work-related purposes. Advise if your vehicle is under a Novated Lease.	
Travel expenses	Summary or receipts of expenses incurred by you & not reimbursed by your employer	
Uniforms & protective clothing	Summary or receipts for purchases of uniforms or protective clothing not provided by your employer	
Self-education expenses	Summary or receipts of self-education expenses, including course fees, textbooks, stationery and Km's travelled to courses; details of the course and nexus with employment.	
Other work related expenses	Summary of receipts of work related expenses including union fees, professional membership subscriptions, stationery, home office, etc.	
Interest or dividend deductions	Bank/ loan statements	
Gifts or donations	Copy of receipts. Please ensure that the recipient is a Deductible Gift Recipient.	
Prior year tax fees	Copy of invoice (if not prepared by JSA Accounting & Tax)	
Income protection insurance	Letter from insurer stating the annual deductible premiums paid	
Any other deductions	Details of any additional deductions not listed above	
OTHER ITEMS	DOCUMENTS REQUIRED	PROVIDED (Y/N)
Superannuation annuity or pension	Payment summary from your payer and any details on deductible or rebatable amounts	
First Home Super Saver Scheme	Documents for any withdrawals	
Superannuation contributions for spouse	Details of superannuation contributions on behalf of your spouse	
Superannuation Contributions Personal, deductible	Copy of Notice to make a Deductible Contribution plus letter from your fund acknowledging the contribution as a concessional contribution	
Private health insurance	Annual statement from your health fund including health fund identification code. You may have to ask your fund to send this statement to you.	
Spouse	Your spouse's taxable income details (if not prepared by JSA)	
Previous year tax return if not prepared by JSA	Please provide a full copy, including any depreciation schedules	

For more information please contact one of our accounting team for assistance

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