

Checklist of items required for individual tax returns.

For the year ended 30 June 2021

- Employee termination payments for period of 1 July 2020 to 30 June 2021.
- Details of any allowances, director's fees, lump sum payments and government pensions and allowances, superannuation income streams and/or lump sums received during year ended 30 June 2021.
- Details of any trust and/or partnership distributions for the year ended 30 June 2021.
- Details of any interest earned on personal bank accounts for the year ended 30 June 2021.
- Copies of any dividend statements for the year ended 30 June 2021, including any dividend reinvestment plans.
- Details of any qualifying shares or rights under employee share schemes earned for the year ended 30 June 2021.
- Copies of any investment tax summaries for the year ended 30 June 2021, including details of any interest prepayments.
- Details of rental property income and expenses for the year ended 30 June 2021.
- Copies of buy and sell contracts for shares bought or sold for the year ended 30 June 2021.
- Copies of documentation in relation the sale of any assets during the year as well as cost base details for the asset and details of any expenditure which forms part of the cost base (e.g. property, cryptocurrency etc).
- Details of any foreign sourced income earned during the year ended 30 June 2021, providing any supporting documentation where applicable.
- Details of any other income earned during the year ended 30 June 2021, including foreign exchange gains, royalties, scholarships, bursaries, grants, Job Keeper and jury attendance fees.
- Details of any child support paid for the year ended 30 June 2021 if applicable.
- Details of work-related car or travel expenses for the year ended 30 June 2021 including details of total kilometres travelled and total work-related kilometres travelled for the year ended 30 June 2021 where applicable.
- Details of uniform, protective clothing, laundry expenses for the year ended 30 June 2021.
- Details of work-related self-education expenses for the year ended 30 June 2021.

- Details of any other work related expenses during the period 1 July 2020 to 30 June 2021 including income protection insurance, subscriptions, home office, purchase of office equipment, tax agent fees etc.
 - Details of the periods you were required to work from home during the year including number of hours per week
 - Details of any donations made during the period 1 July 2020 to 30 June 2021 including donations to school building funds.
 - Details of any superannuation contributions paid personally for the year ended 30 June 2021.
 - Private health insurance statement for the year ended 30 June 2021.
 - Confirmation of bank account details (account number, BSB and account name) for receipt of your 2021 income tax refund from the ATO.
 - Copies of any other relevant documentation.
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