

CHECKLIST OF ITEMS REQUIRED FOR INDIVIDUAL TAX RETURNS FOR THE YEAR ENDED 30 JUNE 2022

<input type="checkbox"/>	Employee termination payments for period of 1 July 2021 to 30 June 2022.
<input type="checkbox"/>	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 2022.
<input type="checkbox"/>	Details of any trust and/or partnership distributions for the year ended 30 June 2022.
<input type="checkbox"/>	Details of any interest earned on personal bank accounts for the year ended 30 June 2022.
<input type="checkbox"/>	Copies of any dividend statements for the year ended 30 June 2022, including any dividend reinvestment plans.
<input type="checkbox"/>	Details of any qualifying shares or rights under employee share schemes earned for the year ended 30 June 2022.
<input type="checkbox"/>	Copies of any investment tax summaries for the year ended 30 June 2022, including details of any interest prepayments.
<input type="checkbox"/>	Details of rental property income and expenses for the year ended 30 June 2022.
<input type="checkbox"/>	Copies of buy and sell contracts for shares bought or sold for the year ended 30 June 2022.
<input type="checkbox"/>	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.
<input type="checkbox"/>	Copies of documentation in relation to the purchase, sale or swap of cryptocurrencies during the year ended 30 th June 2021, including copies of tax statements where available.
<input type="checkbox"/>	Details of any foreign sourced income earned during the year ended 30 June 2022, providing any supporting documentation where applicable.
<input type="checkbox"/>	Details of any other income earned during the year ended 30 June 2022, including foreign exchange gains, royalties, scholarships, bursaries, grants, and jury attendance fees.
<input type="checkbox"/>	Details of any child support paid for the year ended 30 June 2022 if applicable.
<input type="checkbox"/>	Details of work related car or travel expenses for the year ended 30 June 2022 including details of total kilometres travelled and total work related kilometres travelled for the year ended 30 June 2022 where applicable.
<input type="checkbox"/>	Details of uniform, protective clothing, laundry expenses for the year ended 30 June 2022.
<input type="checkbox"/>	Details of work related self-education expenses for the year ended 30 June 2022.
<input type="checkbox"/>	Details of any other work related expenses during the period 1 July 2021 to 30 June 2022 including income protection insurance, subscriptions, home office, purchase of office equipment, tax agent fees etc.

<input type="checkbox"/>	Details of any periods during the year you were required to work from home, including average hours per week.
<input type="checkbox"/>	Details of any donations made during the period 1 July 2021 to 30 June 2022 including donations to school building funds.
<input type="checkbox"/>	Details of any superannuation contributions paid personally for the year ended 30 June 2022.
<input type="checkbox"/>	Confirmation of bank account details (account number, BSB and account name) for receipt of your 2022 income tax refund from the ATO.
<input type="checkbox"/>	Copies of any other relevant documentation.

