

**WDF PROFESSIONAL 2019 YEAR END CHECKLIST
INDIVIDUAL TAX RETURN**

Client Name:

Phone Number:

Email Address:

INCOME

PAYG Payment Summaries, received from employers if applicable. *Not required if your employer is reporting via Single Touch Payroll*

Allowances, earnings, tips

Centrelink payment summaries; Newstart, Youth allowance, Austudy etc.

Eligible termination payments (ETP's)

Lump sum payments

Government pensions & other allowances

Superannuation and annuity income streams

Superannuation lump sum payments

Fringe benefit details

Employee Share Scheme paperwork (ESS)

Interest received – Bank, ATO, Credit Unions

Dividend statements

Child support payments made during year

Super Co-Contributions

Crypto currency – please contact us for specific advice if you invest in Crypto currency

Income from Sharing Economy (*online apps for ride-sourcing, property or room rental, sharing assets or providing personal services*)

Partnership/trust distribution statements, including annual taxation statements

Capital gains

Documents relating to the sale of rental property or holiday home

Cost details for any investment properties purchased during the year

Documents relating to the sale of property received as a result of divorce

Documents relating to the purchase or sale of shares or managed funds	
Rental properties	
Agent statements; and/or	
Detailed listing of income and expenses, including:	
Rental income	
Advertising	
Borrowing Costs	
Cleaning	
Council rates	
Garden/ lawn maintenance	
Interest <i>(loan bank statements for the full financial year)</i>	
Insurance	
Land tax	
Pest control	
Property agent fees/Commission	
Quantity Surveyors report for Building Depreciation	
Repairs & Maintenance	
Strata/Body corporate fees	
Waste removal	
Water rates	
<i>If the property was purchased this year, provide Contract & Settlement Statement & any expenses incurred.</i>	
Foreign Source Income	
Details of any income earned outside Australia	
Jury service fees	
Royalties	
OTHER	
Private health insurance (annual tax statement from health fund)	
EXPENSES – Common Deductions	
Work related car expenses <i>Including log book or mileage</i>	

Work related travel expenses	<i>Excluding travel from home to place of employment</i>	
Work related clothing, laundry & dry cleaning	<i>Including purchase, rental, repair and cleaning of occupation specific or protective clothing & certain work uniforms.</i>	
Work related education expenses	<i>Only where the course of study is to maintain or increase the taxpayer's skills in their current occupation</i>	
Other work related expenses, including:		
Union fees		
Overtime meals		
Formal education courses provided by professional associations		
Seminars, conferences or education workshops		
Books, journals and trade magazines		
Tools and equipment		
Protective items, e.g. sunglasses and sunscreen		
Computers and software		
Telephone and internet		
Home office expenses	<i>Actual expenses or hours per annum</i>	
Interest & dividend deductions	<i>Incurred against assessable interest & dividend income</i>	
Gifts & donations	<i>Donations of \$2 or more to eligible organisations, you can claim pens & ribbons, but do not include raffle tickets, toys</i>	
Personal superannuation contributions	<i>Supply Acknowledgement receipt from super fund for intent to claim</i>	
Cost of managing tax affairs		
Income protection insurance		
EXPENSES – Less Common Deductions		
Other deductions, including:		
Election expenses		
Foreign exchange losses		