

TAX RETURN CHECKLIST 2021

Please find below our quick cheat-sheet guide outlining basic deductions and those work-related expenses you can claim.

**\*\* Please note \*\***

**You no longer need to provide your PAYMENT SUMMARY (the old Group Certificate) – we can access these directly from the ATO.**

**QUICK CHEATSHEET**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **INCOME** |  |  | **DEDUCTIONS**  **(Work related expenses)** |
|  | Income with no PAYG withheld |  |  | Uniforms/workwear |
|  | Bonus Payments & Commissions |  |  | Home Office running expenses |
|  | Dividend Statements for dividends received, or reinvested |  |  | Printing, Postage and Stationery |
|  | Annual Tax Statements from Managed Funds |  |  | Home telephone, mobile & internet |
|  | **OTHER INCOME** |  |  | Computer expenses including depreciation |
|  | Rental property summaries from Agents  \* Refer to the Investment Property Checklist on page 4 \* |  |  | Subscriptions |
|  |  |  | Books, Newspapers & Journals |
|  | Foreign income |  |  | Seminars & Conferences |
|  | Proceeds from sale of Capital item e.g investment properties or shares |  |  | Union fees, memberships, other fees |
|  | **OFFSETS AND REFUNDS** |  |  | Tools & equipment including depreciation |
|  | Health insurance and rebate entitlement statement |  |  | Donations & Gifts |
|  | IAS statements or details of PAYG instalments paid |  |  | Travel (fares and accommodation) |
|  | Spouse details including taxable and exempt income |  |  | Motor vehicle |
|  | Details of any voluntary super contributions made |  |  | Income Protection Insurance |



**FURTHER DETAILS**

The following provides more detail on specific items.

**WORK-RELATED DEDUCTIONS**

|  |  |
| --- | --- |
| Motor Vehicle Expenses | If you used your car for work, you can claim the business use expenses. So, please provide details of all MV costs incurred and business use %.  If you travelled less than 5,000 km’s you do not need to provide receipts, just details of business km’s travelled. |
| Employment Domestic Travel | If you received a travel allowance, please provide details of nights & locations away.  If you didn’t get an allowance, please provide copies of invoices for all expenses. |
| Overseas Travel | Ensure a dairy has been maintained and travel records are kept for 6 nights or more. |
| Work Uniform & workwear | Provide details of expenditure on work uniform & protective clothing, including dry cleaning and laundry costs. |
| Self-Education Expenses | Provide details of all expenses incurred relating to courses taken and how they relate to your current employment. |

**OTHER INFORMATION**

|  |  |
| --- | --- |
| Medicare Levy | Are you entitled to the Medicare Levy exemption or reduction? If so, please provide details. |
| Private Health Insurance | Were you and all your dependents covered by private health insurance hospital cover for the entire year? If yes, please provide your health insurance annual statement. |
| Spouse Details | Did you have a dependent spouse for the full financial year? If so, please provide their full name and date of birth. |
| HECS/HELP debt | If you had a HECS/HELP debt please provide statement. |
| Child Support | Have you paid or received Child Support during the year? If so, please provide details. |