

# ASPIRE

ACCOUNTING PROFESSIONALS

## Individual Tax Return Checklist



- PAYG Payment Summaries received from employers, annuities, superannuation funds  
Under Single Touch Payroll, most employees will no longer receive these, but will need to wait until their employer has "Finalised" their payroll.
- Have you received benefits from Centrelink (Services Australia)? This will appear on your ATO records.
- Eligible Termination Payments received from employer or superannuation fund.
- Details of interest earned, dividend and trust income statements. Note that managed funds generally do not issue Annual Tax Statements until towards the end of the September quarter.
- Rental property information - separate checklist available.
- Business income information - separate checklist available.
- Details of any assets such as shares, crypto-currency or property sold/traded.  
Consider using Sharesight and Koinly apps for tax reporting.
- Child support payments made.
- Details of work related use of own motor vehicle, including log book records.
- Details of work related expenses including professional association fees, tools and equipment replaced, home office, self education, uniform and protective clothing, training conferences.
- Receipts for donations made.
- Amount paid to tax agent for prior year return.
- Income Protection Insurance premiums for year.
- Private Health Cover Tax Statement which should appear on your ATO records.
- Superannuation contributions made for the year.
- If this is your first tax return with Aspire Accounting Professionals, please bring along a copy of your last completed tax return.

*This list covers standard items and is by no means exhaustive.  
Please provide any other information you feel is relevant and  
greater detail will be obtained at your tax interview.*



ACCOUNTANTS | REGISTERED TAX AGENTS | BUSINESS ADVISORS  
A.B.N. 79 168 811 416 | P O Box 2100 Rosebud Vic 3939  
Shop 6 / 143 Point Nepean Rd, Dromana, VIC, 3936  
03 5981 9426 | [admin@aspireaccounting.com](mailto:admin@aspireaccounting.com) | [www.aspireaccounting.com](http://www.aspireaccounting.com)



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