ITEMS TO CONSIDER

TAX RETURN

*Use our checklist to maximise your deductions and ensure that your tax return is complete.*

General **Income**

|  |  |
| --- | --- |
| [ ]  | PAYG payment Summary /Income Statement from myGov if employer registered for STP |
| [ ]  | Allowances / Tips / Director’s Fees |
| [ ]  | Interest Amounts + TFN Credits |
| [ ]  | Dividend Statements |
| [ ]  | Trust Distributions *(annual tax statements)* |
| [ ]  | Business Income |
| [ ]  | Foreign Income |
| [ ]  | Share sales or purchases, the purchase and sale contract notes |
| [ ]  | Rental property statements from real estate agent  |
| [ ]  | Details of other rental expenditure incurred |
| [ ]  | Real estate sales or purchases, the purchase and sale contract |
| [ ]  | Details of any transactions involving cryptocurrency |
| [ ]  | Details of any income derived from participating in the sharing economy (e.g., Uber driving, rent from AirBNB, jobs completed through Airtasker etc.,) |

GENERAL **TAX DEDUCTIONS**

|  |  |
| --- | --- |
| [ ]  | Work related motor vehicle expenses *(conditions apply)* |
| [ ]  | Travel expenses |
| [ ]   | Work-related clothing & laundry *(conditions apply)* |
| [ ]  | Self-education expenses |

SPECIFIC **DEDUCTIONS**

|  |  |
| --- | --- |
| [ ]  | Income Protection Insurance |
| [ ]  | Union Fees |
| [ ]  | Home Office Expenses |
| [ ]  | Seminars / Courses / Conferences |
| [ ]  | Overtime Meal Expenses |
| [ ]  | Briefcase |
| [ ]  | Tools + Equipment |
| [ ]  | Telephone / Mobile Phone / Internet |
| [ ]  | Bank Fees *(e.g. re: deductible purchases)* |
| [ ]  | Interest Expenses *(e.g. re: deductible purchases)* |
| [ ]  | Sun Protection Items *(e.g. sunscreen, safety glasses, protective gloves)* |
| [ ]  | Reference Books / Journals / Trade Magazines |
| [ ]  | Superannuation Contributions |
| [ ]  | Tax related expenses *(inc. tax agent fees, travel to tax agent)* |
| [ ]  | Gifts + Donations |

*For more download our free tax-deduction comprehensive checklist at*<https://www.rivafinancial.com.au/resources>

*Contact us for occupation specific tax deductions.*

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