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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