

## ITEMS TO CONSIDER

*To maximise your deductions and ensure that your tax return is complete, please review the following items and advise your Accountant if any apply to you.*

### Income

- ☐ PAYG payment Summary (employment)/Income Statement from myGov or Tax Agent Portal if employer registered for STP
- ☐ Allowances / Tips / Director's Fees
- ☐ Employer Lump Sum Payment
- ☐ Centrelink / Pension Income
- ☐ Annuities / Superannuation Lump Sum Payments
- ☐ Interest Amounts + TFN Credits
- ☐ Dividend Statements
- ☐ Employee Share Schemes
- ☐ Partnership + Trust Distributions
- ☐ Business Income
- ☐ Capital Gains / Losses – Property / Shares
- ☐ Foreign Income
- ☐ Rental Property Income
- ☐ Royalties
- ☐ Taxable Scholarships
- ☐ Jury Service Payments

### General Tax Deductions

- ☐ Work related motor vehicle expenses (*logbook maybe required*)
- ☐ Gifts + Donations
- ☐ Tax related expenses (*inc. tax agent fees, travel to tax agent*)



### Other Items to Consider

- ☐ HELP (higher Education Loan Program) / HECS
- ☐ SFSS (Student Financial Supplement Scheme)
- ☐ Child Support Agency Liability
- ☐ Net Medical Expenses Offset
- ☐ Health Insurance Statement
- ☐ PAYG Instalment Credits
- ☐ Other Offsets + Tax Credits
- ☐ Reportable Fringe Benefits Amount

### Specific Deductions

- ☐ Un-deducted Purchase Price – Pension / Annuity
- ☐ 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
- ☐ Prior Year Losses
- ☐ Superannuation Contributions