

2019 - 2020

ANNUAL TAX CHECKLIST – Individual

Please use this checklist and include with your accounting records to ensure that all relevant information is provided to enable us to complete your tax work.

Name of Taxpayer: _____ TFN: _____

Address: _____

Contact No: _____ ABN: _____

Email address: _____

GENERAL INFORMATION

ATTACHED

• **Income**

- Payment Summaries for any work performed
- Details on allowances, directors fees etc earned
- Dividend information (copies of dividend advices)
- Managed funds (copies of Annual Tax Statements)
- Interest received on personal bank accounts (copies of statements)
- Any other income received – Digital Currencies – Purchase/Trading

• **Deductions**

- Work related expenses (copies of receipts)
- Work related car expenses (details of business kms travelled and type of car used or log book) – **ATO AUDIT TARGET**

CAR

Make/Model: _____

Rego: _____

Main Driver: _____

Opening + Closing Speedo: _____

- Superannuation contributions and policy number
- Donations (Copies of receipts)
- Self education expenses (Copies of receipts)
- Receipts for purchase of uniforms/ protective clothing, laundry or dry cleaning – **ATO AUDIT TARGET**
- Income protection (Annual premiums paid)

• **Private Health Cover**

- Include a copy of your Annual Health Cover statement as issued by your private health cover provider

• **Rental Properties**

- Income details or property agent statements
- Details on loans, showing interest on rental property
- Expenses relating to rental property
- Quantity Surveyors tax depreciation report (if applicable)
- Period of rental for 2019/20
- Address of Rental Property/s
- If purchased or sold during 2019/20, copies of settlement statement & contract
- If you have not previously supplied WCC with your purchase details, please provide them for us to keep on file for future capital gains tax purposes

