Tax Return Checklist

Individuals & sole traders · Tick off what applies to you before your appointment

UV TAX
Registered Tax Agent 26260509

Having these ready makes your tax return faster and helps make sure you don't miss deductions. Not sure if something applies? Bring it anyway – we'll check it for you.

1. About you

- ☐ Full name, date of birth and address
- ☐ Tax file number (TFN)
- ☐ Bank account details for your refund
- ☐ Spouse's name, DOB and taxable income (if any)
- ☐ Number of dependent children
- ☐ Last year's tax return or notice of assessment

2. Income

- ☐ Income statements / payment summaries from all employers
- ☐ Bank interest (all accounts)
- ☐ Dividend statements and share sale records
- ☐ Government payments (e.g. Centrelink)
- ☐ Super or pension income statements
- ☐ Managed fund / trust distribution statements
- ☐ Crypto transactions for the year

3. Work-related deductions

- ☐ Car expenses – logbook or record of work km
- ☐ Work travel, parking and tolls
- ☐ Uniform, protective clothing and laundry
- ☐ Tools, equipment and computers
- ☐ Phone and internet (work-use %)
- ☐ Working from home – record of hours
- ☐ Self-education and course fees
- ☐ Union fees and professional memberships

4. Other deductions & offsets

- ☐ Donations to registered charities (receipts)
- ☐ Income protection insurance (outside super)
- ☐ Last year's tax agent fees
- ☐ Personal super contributions (and notice of intent)
- ☐ Private health insurance statement
- ☐ Investment loan interest and fees

5. Rental property

- ☐ Rental income statement from agent
- ☐ Loan interest statement
- ☐ Council rates, water, land tax, strata
- ☐ Insurance, repairs and maintenance
- ☐ Depreciation schedule
- ☐ Purchase / sale documents if bought or sold

6. Sole traders & ABN

- ☐ ABN and business income records
- ☐ Business expenses and receipts
- ☐ BAS lodged during the year
- ☐ Vehicle logbook
- ☐ Asset purchases (tools, equipment)
- ☐ Bookkeeping file (Xero, MYOB, QuickBooks)

7. Overseas income & changes this year

- ☐ Foreign income (wages, rent, interest, pensions)
- ☐ Proof of any tax paid overseas
- ☐ Arrival / departure dates if you moved to or left Australia
- ☐ Sold property, shares or crypto this year
- ☐ Changes in marital status or dependants
- ☐ HELP / study loan details (if any)

Free consultation & free fixed quote: 0466 268 405 · (03) 9007 7892

uvtax.com.au · 100% online, Australia-wide

General information only. This checklist is a general guide and does not cover every situation. It is not tax advice and does not take your personal circumstances into account. Deduction rules have conditions and record-keeping requirements. Speak with UV TAX about your situation before lodging.
UV Business & Tax Services Pty Ltd · ABN 50 677 385 214 · Registered Tax Agent 26260509 · ASIC Agent No. 53353.