



Individual Income Tax Return Checklist

Financial Year: 01/07/2019 – 30/06/2020

Income

- PAYG Summary Statement
- Bank Interest receive summary
- Summary of Investments
- Share Dividend Statements
- Trust Distribution Statements
- Managed Fund Statements
- Buy / Sell Contract Notes
- Lump Sum Payments Statements
(eg: Eligible Termination Statements)

Rental Property

- See separate checklist

Deductions

- Receipts of donation to charities
- Receipts of work related deductions
(ie: car/travel/uniform/laundry)
- Receipts of self education expenses
(ie: fees/books/computer costs/travel expenses)
- Income Protection Insurance

Other Information

- Private Health Insurance Statement



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