KENNEDY CROSS
STRATEGIC ADVICE | TAX | ACCOUNTING

2021 INDIVIDUAL TAX RETURN CHECKLIST

Name of taxpayer/s:			
Address:			
Preferred Contact No:		Email:	
Bank Details / Account Name			
BSB:		Acc #	
Do you have a MyGov Account?	Yes / No		
Do you have any ATO debt?	Yes / No		
Are you claiming FBT?	Yes / No		

INFORMATION	INFORMATION PROVIDED	NOT APPLICABLE
INCOME		
PAYG summaries from employers, Centrelink and/or superannuation funds.	☐	☐
Bank statements detailing interest earned.	☐	☐
Dividend statements & Employment Share Scheme (ESS) Statements.	☐	☐
Lump sum payments (e.g., Employment Termination Payment).	☐	☐
Managed fund annual tax statement and capital gains tax statement.	☐	☐
Partnership distribution statement, including a copy of the partnership's tax return.	☐	☐
Trust distribution statement, including a copy of the trust's tax return	☐	☐
Buy/sell contract notes for investments.	☐	☐
Details of insurance pay-outs including income protection, sickness & accident	☐	☐
Details of any share economy income, i.e., ride-sourcing, renting or personal services	☐	☐
WORK-RELATED DEDUCTIONS		
Work related motor vehicle use (details of work-related km's travelled during year or expenses incurred if using log book method and a copy of the logbook that is less than 5 years old) & engine capacity.	☐	☐
Receipts or evidence of work-related deductions such as protective clothing, uniform expenses, stationery, travel & tools.	☐	☐
Breakdown of home office expenses.	☐	☐
Receipts for self-education expenses, continuing professional development courses and seminars.	☐	☐
Professional journals, magazines, memberships & subscriptions.	☐	☐
Details of depreciable assets bought during the year (e.g. laptops) including date purchased	☐	☐

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OTHER DEDUCTIONS		
Receipts for donations of $2 and over to registered charities (Bushfire / Flood tin collection).	☐	☐
Expenditure incurred in managing tax affairs (e.g., tax agent's fees).	☐	☐
Expenditure incurred in earning investment income.	☐	☐
Superannuation contributions, including fund acknowledgement of intent to claim a tax deduction.	☐	☐
RENTAL PROPERTIES		
Annual statement from property agent (if engaging the services of an agent).	☐	☐
Records detailing rental income (if not engaging the services of an agent).	☐	☐
Date of when the property was purchased (exchange of contract date). Please provide settlement sheet.	☐	☐
Details of depreciable assets bought or disposed during the year and/or a copy of the quantity surveyors report.	☐	☐
Expenses incurred, (which are not detailed on the property agent annual statement) such as water charges, land tax and insurance premiums.	☐	☐
If property is held by more than one individual, details of owners and their legal ownership percentage.	☐	☐
If property was disposed of during the income year, information relating to dates and costs associated with the acquisition and disposal of the property (exchange date not settlement date) e.g. Settlement Sheets.	☐	☐
Loan statements for property showing interest paid for the income year.	☐	☐
Period the property was available for rent during the income year.	☐	☐
OFFSETS / REBATES		
Details of any superannuation contributions for spouse.	☐	☐
Details of expenses *for disability aids, attendant care or aged care.*	☐	☐
Private health insurance annual statement.	☐	☐
IF OPERATING AS A SOLE TRADER		
Cashbook, which includes records of cash taken before the business takings are banked.	☐	☐
If you use cloud accounting software, please send your invitation to add us as accountants (if you haven't already) to the following address: Xero Software - xero@kennedycross.com.au MYOB Software - myob@kennedycross.com.au Intuit Software - intuit@kennedycross.com.au	☐	☐

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Copy of files from desktop accounting software. Please provide login, password and software used. Software Used:____ Login:____ PW:____	☐	☐
Copies of PAYG payment summaries and annual statement for employees.	☐	☐
Details of any government grants, rebates or payments received.	☐	☐
Details of superannuation contributions for employees.	☐	☐
Statements for all bank accounts and liabilities of the business (loans).	☐	☐
Copies of any finance contracts.	☐	☐
Breakdown of home office expenses	☐	☐
Copies of Taxable Payments Annual Report (TPAR)	☐	☐
Copies of recent Workers Compensation Declarations	☐	☐
Details of any depreciable assets purchased (e.g., motor vehicles, computers, etc.) including date purchased	☐	☐

Additional Information

- Total child support payments made during the financial year.
- Spouse income (if only completing your tax return) taxable income, reportable fringe benefits, reportable superannuation, financial investment, or rental property losses.
- Complete bank details on page 1 (for refunds - if applicable).
- Confirm number of dependents <25 years if full time students & living at home.
- Details of any personal debts such as mortgages, credit cards, personal loans etc.