

## 2020 INDIVIDUAL TAX RETURN CHECKLIST

Here's a checklist to help you prepare the information for your tax return.

### Income

<input type="checkbox"/>	<b>Payment summaries</b> (previously called Group Certificates). Note for 2019/20 onwards your employer may not give you a copy of these but rather you will access on MyGov.
<input type="checkbox"/>	<b>Centrelink statement</b> for Newstart Allowance, Pension payments, Austudy, Youth Allowance, Parenting Payment (Partnered). Again these will be accessible on your MyGov account. We do not require details of your Family Tax Benefit Payments
<input type="checkbox"/>	<b>Bank interest</b> Earned
<input type="checkbox"/>	<b>Dividends received</b>
<input type="checkbox"/>	<b>Rental income</b> (refer to separate checklist)
<input type="checkbox"/>	Annual distribution and tax statements for <b>Managed Funds</b>
<input type="checkbox"/>	Purchase & sale details for <b>investments sold</b> including shares. This should include the date of purchase & sale & the cost and sale amounts

### Motor Vehicle Expenses

<input type="checkbox"/>	Do you use your <b>car for work purposes other than travelling directly to and from work?</b> This may include visiting suppliers/customers, picking up materials, attending external training. You can claim using one of 2 methods below.
<input type="checkbox"/>	If you have prepared a <b>log book</b> then provide a copy of the log book along with all running costs for the motor vehicle for the 2019/20 year, ie petrol, registration, insurance, servicing, RAA membership, car wash. Include cost and date the vehicle was purchased.

<input type="checkbox"/>	Alternatively advise the number of <b>kilometres travelled for work</b> for the 2019/20 year - up to a maximum of 5,000 km. Note this generally excludes travel directly from home to work and from work to home.
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### Other Work-related Expenses

<input type="checkbox"/>	Did you use your <b>mobile phone</b> for work purposes during the 2019/20 year? If yes advise your total phone cost for 2019/20 along with your business use percentage.
<input type="checkbox"/>	Did you undertake any <b>work from home</b> during the 2019/20 year? If yes advise the average number of hours per month that you worked from home.
<input type="checkbox"/>	Did you use your <b>home internet</b> for work purposes? If yes, then advise your total home internet cost for the 2019/20 year along with work use percentage.
<input type="checkbox"/>	Do you wear a <b>compulsory work uniform</b> ? Typically, this would be embroidered with your work details. If yes advise amount spent on these items for 2019/20.
<input type="checkbox"/>	Do you wear <b>protective clothing</b> for work, ie steel capped boots, high vis clothing, safety glasses? If yes advise amount spent on these items for 2019/20.
<input type="checkbox"/>	Do you use any <b>other electronic devices</b> for work – ie computer, iPad. If yes then advise date you purchased the item, cost and work use percentage
<input type="checkbox"/>	Did you undertake any <b>study</b> during the 2019/20 year which has a connection to your work activities? If yes then advise all study expenses incurred during 2019/20 including course fees, books, stationery
<input type="checkbox"/>	<b>Other work-related expenses</b> include Union Fees, Professional Subscriptions, Professional Magazines, Tools

### Other Information

<input type="checkbox"/>	Details of any <b>gifts or donations</b>
<input type="checkbox"/>	Details of <b>income protection insurance</b> paid.
<input type="checkbox"/>	Details of <b>last year's tax return fee if not MCG Accountants.</b>
<input type="checkbox"/>	Annual <b>private health</b> fund statement
<input type="checkbox"/>	If you have a <b>partner or spouse</b> – their name, dob and taxable income
<input type="checkbox"/>	<b>Any other information</b> you may think is relevant. Each person's circumstances are unique

