



# CHAPPEL ACCOUNTING PTY LTD

## PUBLIC ACCOUNTANT & TAX AGENT

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### Salary and Wage Earners Checklist

The following tax return checklist details some of the documents and information that is required when preparing your Income Tax Return. Please check the list and bring any relevant documentation with you as the ATO prefill information cannot be relied upon.

#### **Income**

- Payment Summaries/Income Statements, including Centrelink need to be finalised prior to appointment, eg Tax Ready status on ATO My Gov
- Lump Sum and Termination Payment Summaries
- Interest income from banks and building societies
- Dividend statements for dividends received or reinvested
- Annual Tax Statements from Managed Funds
- Statements for any COVID-19 related payments – if you have received any COVID-19 related payments, you will need to provide documents as may not be available to us through our online portal
- Other income:
  - Rental Properties (see: Rental Property Checklist)
  - Business (see: ABN not GST registered Checklist)
  - Foreign Income
  - Capital Gains (Purchase and Sale detail)
  - Crypto Trading
  - Employee Share Schemes

#### **Deductions - Work related expenses:**

- Motor Vehicle - Log Book required with claim for expenses
  - If Ute or Dual Cab, you will need to supply Vehicle Specifications including Gross Vehicle Weight and Basic Kerb Weight to assess if Motor Vehicle or Workhorse
- Travel (fares and accommodation)
- Uniforms/work-wear
- Self education and professional development
- Union, registrations, tools, subscriptions, memberships
- Home office, seminars and conferences
- Telephone, computer, internet
- Any other costs incurred in earning income
- Donations to charities or building funds (registered gift recipients)
- Income protection insurance
- Prior year tax return preparation fee
- Personal Superannuation Contributions (super fund notification letter required)

#### **Offsets and Refunds**

- Health insurance and rebate entitlement statement
- IAS statements or details of PAYG instalments paid
- HECS-HELP Loan
- Spouse and Children's details including taxable and exempt income
- Outstanding Debts to Government Department e.g. ATO, Centrelink, Child Support
- Superannuation co-contribution and Superannuation contributions for spouse

## Fee From Refund

If you choose to pay via Fee From Refund (FFR), an additional fee of \$55.00 will be incurred. This is due to administration cost for compliance and audit purposes. To avoid the additional FFR fee we strongly encourage you to pay on completion of your return. Your ATO refund will then be directed to your nominated bank account when released from the ATO. Payment of fees is required on preparation of Income Tax Return and prior to Lodgement, unless fee from refund is agreed.

**For Tax Refunds – Please ensure you have proof of your Bank Account Details including BSB and Account Number**

