



Tax Way Accountants
Address: Level 19 180 Lonsdale Street
Melbourne VIC 3000
Ph: 03 9005 6266 Wechat: tax-way
Website: www.taxway.com.au
Email: simon.wang@taxway.com.au
[Online Appointments](#)



Tax Way Group Pty Ltd
is a CPA Practice

Individual Tax Return Check List

First Name, Last Name, Date of Birth, Tax File Number, Home Address, Post Address, Banking Details for Refund (BSB, Account Number & Account Name), Number of Children.

Spouse details including taxable and exempt income.

Health insurance and rebate entitlement statement

Income:

- Payment Summaries / Income Statement in Mygov marked as Tax Ready
- Lump Sum and Termination Payment Summaries
- Government payment statements, if received
- Interest income from banks and building societies
- Annual Tax Statements from Managed Funds
- Employee Share Schemes
- Buy/sell contract notes for shares (if any shares were sold)
- Statements of dividends received or invested
- Details on foreign earnings

Other Income:

- Rental properties [Please download Rental Properties Checklist]
- ABN Income [Please download ABN Checklist]
- Capital Gain on Investment Properties [Please download Capital Gain Checklist]

Work Related Expense:

- Motor Vehicle
- Travel (fares and accommodation)
- Uniforms / work-wear
- Self-education and professional Development
- Union, Registration, tools, subscriptions, memberships
- Home Office, seminars, conference
- Telephone, computer, internet
- Any other costs incurred earning income
- Donations to charities or building funds
- Income Protection Insurance