

2023 Individual Tax Return Checklist

Information	Information provided	Not applicable
Income		
Income statement/PAYG payment summaries	<input type="checkbox"/>	<input type="checkbox"/>
Lump sum payments (eg employment termination payment)	<input type="checkbox"/>	<input type="checkbox"/>
Non-cash benefits	<input type="checkbox"/>	<input type="checkbox"/>
Partnership distribution statement, including copy of partnership tax return	<input type="checkbox"/>	<input type="checkbox"/>
Trust distribution statement, including copy of trust tax return	<input type="checkbox"/>	<input type="checkbox"/>
Documentation re foreign source income, foreign assets or property	<input type="checkbox"/>	<input type="checkbox"/>
Bank statements stating interest earned, including for term deposits	<input type="checkbox"/>	<input type="checkbox"/>
Dividend statements	<input type="checkbox"/>	<input type="checkbox"/>
Employee share scheme statements	<input type="checkbox"/>	<input type="checkbox"/>
Managed fund annual tax statement and capital gains tax statement – <i>usually available from September onward.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Buy/sell contract notes for any share transactions – <i>for sale of shares the contract date is important, not when the trade settles.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Contracts to acquire/dispose of investments other than shares and rental properties	<input type="checkbox"/>	<input type="checkbox"/>
Records of cryptocurrency wallet transactions (eg Bitcoin) - <i>a capital gains event occurs when you dispose of your cryptocurrency, whether by selling, exchanging, trading, use crypto to obtain goods or services or converting to another real currency (eg AUD).</i>	<input type="checkbox"/>	<input type="checkbox"/>
Work-related deductions (the ATO has released 39 specific occupation guides)		
Details of depreciable assets bought or disposed of during the income year (eg laptops)	<input type="checkbox"/>	<input type="checkbox"/>
Details and receipts for home office expenses, including a diary for set rate deduction for working at home expenses. <i>For the new 67c/hour rate, provide the number of hours from your diary – this rate covers phone, internet, energy, and stationery. The fixed rate method no longer requires a dedicated work area. A separate claim for equipment depreciation, repairs and maintenance is available.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Professional journals/trade magazines	<input type="checkbox"/>	<input type="checkbox"/>
Professional memberships/subscriptions	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for continuing professional development courses and seminars	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for self-education expenses	<input type="checkbox"/>	<input type="checkbox"/>

Details of any government grants, subsidies, payments or rebates received	<input type="checkbox"/>	<input type="checkbox"/>
Details of superannuation contributions for employees	<input type="checkbox"/>	<input type="checkbox"/>
Details of any assets purchased, including date of purchase and amount	<input type="checkbox"/>	<input type="checkbox"/>
Payments of salaries and superannuation to associates	<input type="checkbox"/>	<input type="checkbox"/>
Records from accounting software (eg trial balance, profit and loss, and balance sheet)	<input type="checkbox"/>	<input type="checkbox"/>
Statements of all liabilities of the business	<input type="checkbox"/>	<input type="checkbox"/>

Information	Information provided	Not applicable
Other information – all individuals		
Details of residency status	<input type="checkbox"/>	<input type="checkbox"/>
Other receipts or outgoings received or incurred, where uncertain if assessable/deductible	<input type="checkbox"/>	<input type="checkbox"/>
Notice of superannuation contributions	<input type="checkbox"/>	<input type="checkbox"/>
Individual's total superannuation balance	<input type="checkbox"/>	<input type="checkbox"/>