

2021 INDIVIDUAL TAX RETURN CHECKLIST



Income

Government or Centrelink Payments
*(e.g Pensions, Sickness Benefits,
Parenting Payments, Newstart, Austudy
& Youth Allowances)*

Personal Services Income &
Business Income *(Sole Trader)*

Interest Received from Savings
(Term Deposits, Bonus Saver Account, etc)

Rental Property Income
(Rental Property Checklist on our Website)

Foreign Source Income

Any other income: *(Please specify below)*

Dividends received on Shares and
Managed Fund Statements
Pension or Annuity Payment Summaries
(Group Certificates)

Details of any Capital Gains Tax Asset Sales
(e.g. Shares and Real Estate).

Income from Trusts and Partnerships
(Distribution Statements)

Lump Sum and Termination Payments
- All documentation should be provided
including an ETP Payment Summary from
the Employer or Fund

Deductions

Motor Vehicle Expenses
(Business Kilometers, Logbook)

Work related Protective Clothing and
Uniform Expenses

Subscriptions
*(Union Membership, Professional Body
Membership, Licensing, etc)*

Cost of Managing Tax Affairs including
litigation costs, ATO interest and
other expenses

Income Protection Insurance Policy
(Sickness and Accident Insurance)

Work related Travel Expenses
*(Airfares, Accommodation, Meals and
Incidentals, etc)*

Tools, Equipment and New Assets
(e.g. Laptops, iPads)

Work related Self Education Expenses
(Course fees, Seminars, Conferences, Books, etc)

Donations of \$2 and over

Interest and Dividend Expenses
*(Bank fees, Margin Loan Interest, Investment
Magazine Subscription, Financial Planning Fees)*

Sun Protection Expenses
*(If mainly working outdoors - sunscreen,
sunglasses, hat, etc)*

Work Related Home Office Expenses
(e.g. Mobile, Internet, Printing & Stationery, etc)

Additional super contributions including the
notice of intent to claim from the super fund

*Please note, under COVID-19 rulings there is an applicable set rate of 80c per each hour worked from home from
1 March 2020 to 30 June 2021*

Other Considerations

- Department Children Details
(Full name, date of birth, taxable income if working)
- DVA Pension & Defence Force Medicare Levy Exemption Certificate
- Plus any other document(s) you believe may be helpful in tax preparation
- HECS, HELP, SFSS and PELS Debt Statement
- If relevant, Spouse Taxable Income and Full Name *(Only if spouse is not also a client)*

If you are uncertain with any items that relate to your 2021 Individual Tax Return, do not hesitate to speak with your HS Plus Advisor.

Additional Notes:

Please Note: To ensure you obtain the maximum deductions you are entitled, and in consideration of the penalty provisions, full details of any claim should be provided and supporting documentation made available to our accountants, including receipts, tax invoices, dockets, logbooks, diary notations or reasonable supporting estimates