

2023 INDIVIDUAL TAX RETURN CHECKLIST



Income

- | | |
|---|--------------------------|
| Government or Centrelink Payments (e.g Pensions, Sickness Benefits, Parenting Payments, Newstart, Austudy & Youth Allowances) | <input type="checkbox"/> |
| Personal Services Income & Business Income (Sole Trader) | <input type="checkbox"/> |
| Interest Received from Savings (Term Deposits, Bonus Saver Account, etc) | <input type="checkbox"/> |
| Foreign Source Income | <input type="checkbox"/> |
| Dividends received on Shares and Managed Fund Statements | <input type="checkbox"/> |
| Pension or Annuity Payment Summaries (Group Certificates) | <input type="checkbox"/> |
| Details of any Capital Gains Tax Asset Sales (e.g. Shares and Real Estate). | <input type="checkbox"/> |
| Income from Trusts and Partnerships (Distribution Statements) | <input type="checkbox"/> |
| Lump Sum and Termination Payments – All documentation should be provided including an ETP Payment Summary from the Employer or Fund | <input type="checkbox"/> |
| Any other income: (Please specify below) | <input type="checkbox"/> |

Deductions

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|---|--------------------------|
| Motor Vehicle Expenses (Business Kilometers, Logbook) | <input type="checkbox"/> |
| Work related Protective Clothing and Uniform Expenses | <input type="checkbox"/> |
| Subscriptions (Union Membership, Professional Body Membership, Licensing, etc) | <input type="checkbox"/> |
| Cost of Managing Tax Affairs including litigation costs, ATO interest and other expenses | <input type="checkbox"/> |
| Income Protection Insurance Policy (Sickness and Accident Insurance) | <input type="checkbox"/> |
| Work related Travel Expenses (Airlines, Accommodation, Meals and Incidentals, etc) | <input type="checkbox"/> |
| Tools, Equipment and New Assets (e.g. Laptops, iPads) | <input type="checkbox"/> |
| Work related Self Education Expenses (Course fees, Seminars, Conferences, Books, etc) | <input type="checkbox"/> |
| Donations of \$2 and over | <input type="checkbox"/> |
| Interest and Dividend Expenses (Bank fees, Margin Loan Interest, Investment Magazine Subscription, Financial Planning Fees) | <input type="checkbox"/> |
| Work Related Home Office Expenses (e.g. Mobile, Internet, Printing & Stationery, etc) | <input type="checkbox"/> |
| Additional super contributions including the notice of intent to claim from the super fund | <input type="checkbox"/> |

Other Considerations

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

If you are uncertain with any items that relate to your 2023 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