

# TAX RETURNS CHECKLIST:

## Income:

- Payment Summaries from all sources of income
- Government payment statements
- Interest income from banks and building societies
- Dividend statements
- Other income:
  - Rental properties
  - Business
  - Foreign income
  - Capital gains

## Deductions:

- Work related expenses:
  - Motor vehicle travel
  - Travel
  - Uniforms
  - Self-education and professional development
  - Union, professional registrations, tools
  - Subscriptions, memberships
  - Home office, seminars, conferences
  - Telephone, computer, internet
- Donations to charities or building funds
- Income protection insurance

## Other information:

- Private health insurance statement
- Spouse details including taxable income