

TAX RETURN

2020 INFORMATION CHECKLIST

FAMILY INFO

Annual private health statement
Spouse legal name & date of birth
Spouse taxable income
No. of dependents

TAX DEDUCTIONS

Donations to charity
Tax accountant fees
Personal Super contributions
Income protection insurance

RENTAL PROPERTY

Purchase date, amount & ownership %
Annual property manager statement
Mortgage interest paid
Expenses not in property manager report
Depreciation report
No. of weeks property available for rent
No. of weeks property rented during year

SHARES & CRYPTOCURRENCY

List of all purchase dates & amounts
List of all sale dates & amounts

WAGES & OTHER INCOME

Copies of group certificate(s)
Interest & dividend income
Any foreign income

WORK RELATED EXPENSES

Business KM driven (not commuting)
Travel expenses not reimbursed
Self education expenses
 School name & certificate earned
 No. of KM driven from work to school
 No. of hours studied from home
 School books and supplies
No. of hours worked from home
Mobile phone cost & business % use
Home internet cost & business % use
Home office rent, utilities, & SQM % of home
Home office supplies & equipment
Protective uniform, gear & supplies
Compulsory work uniform with logo

SOLE TRADER BUSINESS

Xero / MYOB / Quickbooks / Wave / Rounded / Cloud or any other accounting software - invite diana@balancetax.com.au with full access
OR send reports in Excel or CSV format including:
 Profit & loss - cash basis for full year
 Balance sheet as of July 1 (start of year)
 Balance sheet as of June 30 (end of year)
 Full year all transactions in all accounts
Stripe / PayPal annual payments reports
KM driven for business (not commuting)
Logbook info if claiming over 5,000 KM
Mobile phone cost & business % use
Home office rent, utilities & SQM % of home
Home internet cost & business % use
No. of hours worked from home