Navado™
Legal & Financial Group

The following is a checklist of documents and/or information required by Navado Tax Agents, for the purposes of the preparation of your Individual Tax Return. We have created this Individual Tax Return Checklist so that you can review this and where appropriate or possible, bring any documents, records or other information (whether in electronic or hard copy format) to your first appointment with us.

The following list is not exhaustive and there may some more or additional items that we bring to your attention, after we have discussed your matter with you or provided you with further directions.

PERSONAL TAX RETURN CHECKLIST

INCOME		EXPENSES	
PAYG Payment Summaries	☐	Work-related expenses (e.g. uniform, travel, protective clothing)	☐
Payment Summaries from Centrelink (i.e. Newstart, pensions etc)	☐	Motor vehicle log and expense receipts	☐
Eligible Termination Payment statements	☐	Interest and fees on investment loans	☐
Interest earned from Bank accounts (Interest Statements)	☐	Donations to charities (for more than $2.00)	☐
Share dividend statements	☐	Self-education expenses	☐
Income and expenses from investment property	☐	Fee charged for previous year's tax return	☐
Foreign source income (from employment, investments or pension)	☐	Income protection insurance and sickness and accident insurance	☐
Income from Business Activities	☐	Superannuation contributions (if self-employed)	☐
Rental Income	☐	Medical expenses	☐
Income from trusts and partnerships	☐	Professional journals, magazines, memberships and subscriptions	☐
Lump sum payments and insurance compensation payments	☐		
Capital Gains Tax Statements	☐		
Income or capital gains from Managed Funds	☐		
OTHER			
Private health insurance details	☐	Prior year tax losses	☐
Outstanding HELP debt or Financial Supplement loans	☐	Previous year's Income Tax Assessment (for new clients)	☐
Spouse date of birth and taxable income	☐	Bank Account details	☐
Education Expenses relating to children's education (i.e. Computers, usb drives, textbooks, stationery, software)	☐	Child Support Payments	☐
Prior year's tax return	☐		