

**Source Data Checklist****Income**

- PAYG Summaries
- Eligible Termination Payment (ETP's) Summaries
- Centrelink PAYG Summaries (Newstart, youth allowance, Austudy)
- Centrelink pension payments summaries
- Superannuation PAYG payment summaries
- Interest received (provide amount and bank details)
- Dividends received (Provide dividend statement/s)
- Trust distributions (provide payment details)
- Business income. (Provide details ie cash book, business worksheet or MYOB date file)
- Capital gains. Includes sale of real estate, shares and collectables.
- Purchase documents (Includes date and amounts)
- Sale documents (Includes date and amounts)
- Foreign Income (provide payment statement)
- Rent received (provide income summary from real estate agent, personal records or bank statements)
- Other income (provide details on any other assessable income including forestry managed investment schemes.)

**Deductions**

- Work related car expenses.
- Work related travel expenses.
- Work related uniform, protective clothing (can include sun protection)and cleaning and laundry.
- Work related self education expenses (Must be directly related to current income earning activities)

- Other work related expenses including subscriptions, union fees, books and journals.
- Interest paid for shares and investments.
- Gifts or donations over \$2.00
- Previous year tax agent fees (accounting fees)
- Work related home office expenses.
- Work related computer and software expenses.
- Work related tools and equipment. (provide details/receipts)
- Work related telephone expenses.
- Personal superannuation contributions if less than 10% of income is from salary and wages. (ie substantially self employed)
- Income protection insurance.

### **Offsets**

- Spouse details and income.
- Private Health insurance statement.
- Zone offset details. Please provide place of work.