

0	Level 2 64 Hindmarsh Sq
V	Adelaide, SA 5000





2023 – 2024 ANNUAL TAX CHECKLIST - Individual

Please use this checklist and include it with your accounting records to ensure that all relevant information is provided to enable us to complete your tax work. Where possible please scan and email your documentation to the applicable staff member.

to the applicable staff member.	
Name(s):	
END OF FINANCIAL YEAR REPORTS Please let us know how you'd like your final reports provided to you: Printed copy Emailed (PDF format) <email address=""></email>	
NDIVIDUAL TAX RETURN INFORMATION Please include copies/originals of the following information for each individual in your family. Not all of these may apply to you	hed
 Electronic Funds Transfer (EFT) Please provide bank details for the account you wish to have your refund credited to below: 	
Account Name:	
BSB Number:	
Account Number:	
 Income Payment Summaries / Income Statements for any work performed * Payment Summaries for any Centrelink payments received * Details on allowances, director's fees etc earned Dividend information (copies of dividend slips) Managed funds (copies of Annual Tax Statements) Interest received on personal bank accounts (copies of statements) Details of any FMDs withdrawn throughout the year. Any other income received 	
Please note most payment summaries are now issued electronically and you will not receive a statement, but likely confirmation the statement has been prepared and is available for lodgement.	
 Deductions Work-related expenses (copies of receipts) Work-related car expenses (see motor vehicle section on page 2)]

- Working from home expenses (total hours worked from home for 2023/24)
- Personal superannuation contributions.
- Donations (copies of receipts)
- Self-education expenses (copies of receipts)
- Details of any FMD's deposited throughout the year.

	 Capital Gains / Losses Details of shares or units purchased and sold during the year Details of other assets purchased and sold during the year 	
	 Rental Properties Income details or property agent statements Details on loans, showing interest on rental property Expenses relating to rental property Quantity Surveyors tax depreciation report (if applicable) Period of rental for 2023/24 Address of Rental Property/s If purchased or sold during 2023/24, copies of the settlement statement and contract If you have not previously supplied MBS with your property purchase details, please provide them for us to keep on file for capital gains tax purposes 	
	 Private Health Cover Include a copy of your Annual Health Cover statement as issued by your provider (Please include both sides of the document for identifying who is covered by the policy 	<u> </u>
M	OTOR VEHICLE DETAILS	
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