

INDIVIDUAL CHECKLIST



Client Name: _____

- Interest income from banks and building societies
- Dividend statements for dividends received
- Tax statements of managed investment funds
- Rental property statements from real estate agent and details of other expenditure incurred
- For share sales or purchases, the purchase and sale contract notes
- For real estate sales or purchases, the solicitor's correspondence for the purchase and sale
- Any work related expenses you want to claim as a deduction
- Self-education expenses
- Travel expenses
- Donations to charities
- Payments for income protection or sickness and accident insurance
- Private health insurance statement. These are now available through the ATO portal, but please advise us if there have been any changes
- Family tax benefits received
- Commonwealth assistance notices
- Details of any transactions involving cryptocurrency (eg Bitcoin)
- Details of any income derived from participating in the sharing economy (eg rent from AirBNB)
- Other information

Please return this form to Lincolns