



## Easy Tax Return Checklist (Individual)

Use this checklist to collect the relevant information required for your Highview accountant to complete your individual tax return. You can use your scanner or mobile phone to take photos/copies. Please keep hardcopies for your records.

If you have any questions, please don't hesitate to call your local office:

Cranbourne (03) 5900 1000 | Prahran (03) 9529 1566 | Mornington (03) 5911 2100

### Personal Details

- Full name
- Date of birth
- Phone number
- Address
- Banking details  
(BSB, Account name & Number)
- Tax file number
- ABN

### Income

- Payment summaries
- Lump sum & termination  
payment summaries
- Government payment statements
- Interest income from banks &  
building societies
- Dividend statements
- Annual tax statements from  
managed funds
- Rental property income
- Foreign income
- Capital gains
- Employee share schemes
- Share Buy & Sell Certificates

### Deductions

We do not need to see your receipts.

A spreadsheet with amount & description is fine.

- Work related expenses:
  - Motor vehicle
    - Copy of log book
  - Travel (fares & accommodation)
  - Uniforms/work-wear
  - Self-education & professional development
  - Union, registrations, tools, subscriptions,  
memberships
  - Home office, seminars, conferences
  - Telephone, computer, internet
  - Any other costs incurred earning income
- Donations to charities or building funds
- Income protection insurance
- Superannuation contributions for personal deductions

### Offsets & Refunds

- Health insurance & rebate entitlement statement
- Spouse details including taxable income  
(if we are not completing their return)

### New Clients to Highview

- Copies of last year's tax returns



#### Tips for taking a photo with your mobile

If you are using your mobile phone to take a photo of the relevant documents please make sure the photos are in focus and no information is cut off.