



# Tax Return Checklist

**BALLAST**  
ACCOUNTANTS



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Ballast Accountants Pty Ltd Registered  
Tax Agent Number: 76473006  
BAS Agent Number: 26233797

## Income

- ☐ PAYG payment summaries
- ☐ Aus Gov pensions/allowances
- ☐ Bank statements stating interest earned
- ☐ Dividend statements
- ☐ Partnership/Trust distribution statement
- ☐ Sole trader income/expenses
- ☐ Disposal of shares/crypto/property
- ☐ Foreign income source
- ☐ Rental income/expenses
- ☐ Capital Gains

## Deductions

- ☐ Car for work-related travel
- ☐ Laundry for work-related clothes
- ☐ Phone/data/internet for work purposes
- ☐ Protective or occupation specific clothing
- ☐ Union fees, subscriptions
- ☐ Working with Children Check
- ☐ Donations
- ☐ Cost of last years tax agent fees
- ☐ Work-related travel expenses
- ☐ Tools, equipment and other work-related purchases
- ☐ Income protection insurance premiums
- ☐ Interest and other investment-related expenses
- ☐ Personal superannuation contributions
- ☐ Home office/WFH
- ☐ Seminars, conferences, training courses

## Important information to have

### For Everyone:

- ☐ Tax File Number
- ☐ Bank details
- ☐ Medicare number
- ☐ All income information
- ☐ All deduction-related receipts

### For Sole Traders:

- ☐ Income/expenses
- ☐ BAS lodged
- ☐ Any government payments, grants or rebates received
- ☐ Notice of Superannuation contributed

### For Rental Properties:

- ☐ Date of property purchase
- ☐ Date property was first rented
- ☐ Ownership (%)
- ☐ Period property was rented per year
- ☐ Real Estate Annual Statement
- ☐ Depreciation Report