



CHAPPEL ACCOUNTING PTY LTD

PUBLIC ACCOUNTANT & TAX AGENT

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Wages and ABN Holder not registered for GST Checklist

The following tax return checklist details some of the documents and information that is required when preparing your Income Tax Return. Please check the list and bring any relevant documentation with you as the ATO prefill information cannot be relied upon.

Income

- Payment Summaries/Income Statements, including Centrelink need to be finalised prior to appointment, eg Tax Ready status on ATO My Gov
- Provide a total income summary from ABN trade in excel, accounting software or manually
- Lump Sum and Termination Payment Summaries
- Interest income from banks and building societies
- Dividend statements for dividends received or reinvested
- Annual Tax Statements from Managed Funds
- Other income:
 - Rental Properties (see: Rental Property Checklist)
 - Foreign Income
 - Capital Gains (Purchase and Sale detail) – **ATO Focus Point**
 - Crypto Trading
 - Employee Share Schemes

Deductions – Business / Work related expenses: – ATO Focus Point

- Provide total of business related expenses summary in excel, accounting software or manually
- Stocktake value as at 30th June inc Cattle numbers if applicable
- Copies of bank statements to 30th June if you require a full set of financial statements
- Copies of all loan statements and term deposits for interest
- Motor Vehicle (Log Book)
 - If Ute or Dual Cab, you will need to supply Vehicle Specifications including Gross Vehicle Weight and Basic Kerb Weight to assess if Motor Vehicle or Workhorse
- Travel (fares and accommodation)
- Uniforms/work-wear
- Self education and professional development
- Union, registrations, tools, subscriptions, memberships
- Home office Expenses – logbook required
- Seminars and conferences
- Telephone, computer, internet
- Donations to charities or building funds (registered gift recipients)
- Income protection insurance
- Prior year tax return preparation fee
- Personal Superannuation Contributions (super fund notification letter required)
- Truck Driver Daily Allowance – **ATO Focus Point**

Offsets and Refunds

- Health insurance and rebate entitlement statement
- IAS statements or details of PAYG instalments paid
- HECS-HELP Loan

Liability limited by a scheme approved under Professional Standards Legislation.

- Spouse and Children's details including taxable and exempt income
- Outstanding Debts to Government Department e.g. ATO, Centrelink, Child Support
- Superannuation co-contribution and Superannuation contributions for spouse

Payment of Invoice

Fee From Refund is no longer available. Payment of 2025 Income Tax Return can be either via Eftpos, EFT or online payment services. Payment via Eftpos on the day of your appointment (if applicable) is preferred. Please note, we may hold the lodgement of your Income Tax Return until payment of invoice has been received.

For Tax Refunds – Please ensure you have proof of your Bank Account Details including BSB and Account Number

