



needhams

Needhams Business and Financial Strategies

2018 Checklist

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CHECKLIST FOR INDIVIDUAL TAX PREPERATION

- PAYG Summaries (Group Certificate)
- Eligible termination payments
- Centrelink PAYG summary (E.g. Pension, sole parent, new start)
- Superannuation
- Cash Management & Bank Interest received
- Dividends received (E.g. Telstra, IAG) – including dividend reinvestments
- Partnership Distributions
- Trust Distribution (provide end of year Tax summary)
- Sale of shares
- Eligible Deductions
- Donations
- Private Health Insurance



DEDUCTIONS THAT CAN BE CLAIMED

- Business Kilometres Travelled, log book , motor vehicle
- Airfares, parking, tolls (work related)
- Uniform Purchases (with Logo) protective clothing & dry cleaning
- Self-education costs (Fees, expenses, travel)
- Union/membership fees/professional subscriptions
- Home office (hours worked at home per week)
- Telephone or Mobile (work related)
- Work related computer or internet usage
- Donations/school building fund contributions
- Financial advice/consultation fees
- Tax agent fees

