

2021 Tax Return Checklist

We want to make it easy for you to collate your documents to send to us.
Please have a look below at the information you may need to provide to us.

Other Income

- Rental properties (please see our rental property checklist)
- Business
- Foreign income
- Capital Gains
- Employee share scheme
- Cryptocurrency (please send us your end of financial year statement)

Deductions (work related expenses)

- Motor vehicle
- Travel (fares & accommodation)
- Uniforms/ workwear
- Self-education and professional development
- Union, registration, tools, subscriptions, memberships
- Home office, seminars, conferences
- Telephone, computer, internet
- Any other costs incurred earning income
- Donations
- Income protection insurance

Remember to tell us if....

- Bank account details have changed
- Address details have changed due to moving

Offsets and refunds

- Health insurance statement
- Spouse details including taxable, exempt income and dependants

If you wish to claim a deduction for working from home during COVID, please indicate which of the following methods, you would like to use to make your claim (or contact us for more details):

COVID Working from home

Shortcut Method

(\$0.80 per hour, covers all working from home expenses), please advise:

- The number of hours you worked from home in the 2021 financial year (note you are required to have a record to substantiate this figure)

Fixed Rate Method

(\$0.52 per hour, covers all working from home expenses except phone, internet and depreciation on equipment these expenses can be claimed separately), please advise:

- The number of hours you worked from home in the 2021 financial year (note you are required to have a record to substantiate this figure)
- The additional costs you incurred working from home for phone, internet and equipment

*For the fixed rate method you must have a dedicated home work area.