



# Individual Tax Return Information Checklist 2023


**SPECTRUM  
ACCOUNTANTS**

*Growing business*

Client name: \_\_\_\_\_

Email: \_\_\_\_\_

Supplied N/A

- |  |  |                          |                          |
|--|--|--------------------------|--------------------------|
| 1) <del>PAYG Payment Summaries</del>   | <b>Note!</b> PAYG Payment Summaries have been phased out under the Single Touch Payroll regime. Instead, that data is made available on your MyGov account and to us directly. |                          |                          |
| 2) Lump Sum and Termination payments   |  | <input type="checkbox"/> | <input type="checkbox"/> |
| 3) Government pensions, allowances & assessable payments. ( <b>Note!</b> No need to provide JobSeeker payments received, these will be available to us from the ATO, which we can retrieve.) |  | <input type="checkbox"/> | <input type="checkbox"/> |
| 4) Other pensions &/or annuities   |  | <input type="checkbox"/> | <input type="checkbox"/> |
| 5) Tax statements of managed investment funds  |  | <input type="checkbox"/> | <input type="checkbox"/> |
| 6) Interest income from banks and building societies   |  | <input type="checkbox"/> | <input type="checkbox"/> |
| 7) Dividend statements for dividends received  |  | <input type="checkbox"/> | <input type="checkbox"/> |
| 8) Contracts and details of shares sold or purchased   |  | <input type="checkbox"/> | <input type="checkbox"/> |
| 9) Contracts and details of investment real estate sold or purchased   |  | <input type="checkbox"/> | <input type="checkbox"/> |
| 10) Rental property statements from real estate agent and details of other expenditure incurred. See <a href="#">our website</a> for a more detailed rental checklist*                       |  | <input type="checkbox"/> | <input type="checkbox"/> |
|  |  <b>Warning!</b> ATO data matching expanded to include residential rental property loans      |                          |                          |
| 11) Work related expenses including (broadly);   |  | <input type="checkbox"/> | <input type="checkbox"/> |
| + Car expenses ( <i>Only the logbook and cents/km methods remain</i> )   |  | <input type="checkbox"/> | <input type="checkbox"/> |
| + Travel expenses  |  | <input type="checkbox"/> | <input type="checkbox"/> |
| + Clothing & laundry expenses  |  | <input type="checkbox"/> | <input type="checkbox"/> |
| + Self-education expenses  |  | <input type="checkbox"/> | <input type="checkbox"/> |
| + Other work-related expenses  |  | <input type="checkbox"/> | <input type="checkbox"/> |
| + Calculations / estimates of work-use percentages   |  | <input type="checkbox"/> | <input type="checkbox"/> |
|  | Refer to the <a href="#">Spectrum website</a> for a more detailed checklist for this item;   |                          |                          |
| 12) Motor vehicle logbook (where required)   |  | <input type="checkbox"/> | <input type="checkbox"/> |
| 13) Donations to charities ( <a href="#">registered deductible gift recipients only</a> )  |  | <input type="checkbox"/> | <input type="checkbox"/> |
| 14) <del>Private health insurance tax statement</del> ( <b>Note!</b> Health insurers now send statements electronically to the ATO, which we can retrieve – no need to provide this)         |  |                          |                          |
| 15) Income protection premiums paid (statements)   |  | <input type="checkbox"/> | <input type="checkbox"/> |
| 16) Spouse Income Tax Return (if not prepared by Spectrum)   |  | <input type="checkbox"/> | <input type="checkbox"/> |
| 17) Number of dependent children and amount of child support paid (if applicable)  |  | <input type="checkbox"/> | <input type="checkbox"/> |
| 18) Personal Superannuation contributions (if claiming a deduction)  |  | <input type="checkbox"/> | <input type="checkbox"/> |
| 19) Whether you sold your home during the year   |  | <input type="checkbox"/> | <input type="checkbox"/> |
| 20) Crypto-currency trading information and holding value at 30 June 2023  |  | <input type="checkbox"/> | <input type="checkbox"/> |
| 21) Anything else you feel may be relevant   |  | <input type="checkbox"/> | <input type="checkbox"/> |



**Note!** The Low to Middle Income Tax Offset (LMITO) has been removed, so we're expecting to see lower refunds across the board, by up to \$1,500, all other things being as normal.

Please attach this checklist with your 2023 tax information.

\* If you are having trouble obtaining any additional information or checklists from our websites, please call our office and we will be happy to arrange for paper copies to be sent to you.