



TRADIES TAX CHECKLIST

Please review the following list and forward any information that is relevant to you.

INCOME

- PAYG Summaries
- Pensions or government payments/allowances
- Interest earned for the relevant year from your banks, building societies etc.
- Dividend statements
- Details of rental property income
- Details of any business income
- Details of any other income earned

GENERAL EXPENSES

- Personal car expenses (estimation of Kilometres if no logbook kept, otherwise logbook and all expense items.)
- Travel expenses (flights, taxis, train and bus fares for training courses, trade fairs etc.)
- Accommodation costs while working away from home
- Phone costs (for work usage)
- Work percentage of computer/laptop expenses (lease or purchase)
- Work percentage of internet costs
- Home office running expenses
- Work related self-education expenses

TRADIE WORK EXPENSES

- Repair/maintenance costs of work-related tools and equipment
- Interest on loans taken out to purchase work related equipment
- Job related self-education expenses
- License and association fees.
- Leasing costs of work-related equipment and tools
- Purchase costs of equipment, used for your job, costing MORE than \$300. (power tools and machinery, tool boxes)
- Purchase and laundering costs of compulsory uniforms
- Protective items (overalls, hi vis vests, boots, knee pads, goggles, gloves, sun screen, sunglasses)
- Itemised purchase costs of tools up to \$300 (levels, hardware, tool belt, saws, measures, drill bits, clamps, work bags etc.)
- Work manuals and subscriptions
- Insurance



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OTHER EXPENSES

- Rental property expenses (e.g. rates, body corp fees, agent fees, interest on loan, repairs and maintenance, water rates, depreciation schedule)
- Investment expenses (e.g. bank fees, financial advisers fees, investment borrowings etc.)
- Last year's tax return fees
- Last years financial software fees (e.g Xero, Quickbooks etc. Check this isn't included in your accountant fees)
- Income protection insurance premiums (paid outside of Superannuation)

RECORDS

- Records of sales and purchases of any shares, business or property
- Private health insurance details
- Spouse details
- Charity donations
- Children's details including D.O.B and evidence of any Centrelink benefits
- Details of any government debts (child support, Centrelink etc.)

BANK DETAILS

If you are due a refund the ATO will require your bank details to deposit your refund:

- BSB
- Account number
- Account name

YOUR NOTES