

2023 Tax Essentials Checklist

Hannans360° want to make tax time a breeze for you

What will I need?

- Driver's licence or other photo identification
- Bank statement and/or bank details for your refund
- Income and deduction information per our checklist below
- Tax file number (TFN) - usually written on your payment summary

Income & Deductions Checklist

Income

- Payment Summaries
- Employment Termination Payments (ETP)
- Taxable Australian Government Pensions & Allowances
- Superannuation Income Streams & Lump Sum Payments
- Interest Income earned on bank statements
- Dividends received including Employee Share Schemes
- Distributions from Partnerships & Trusts

Other Items

- Private Health
- Capital Gains & Losses – Sales of Assets including shares, crypto, and properties will need to be considered
- Rental Properties – Please request our Rental Property checklist if you don't already have a copy

Deductions

- Motor Vehicle logbooks and/or business kms travelled
- Travel expenses including parking, tolls, accommodations related to business
- Eligible uniforms and laundry expenses
- Phone & Internet use
- Union Fees
- Allowances – Overtime, Meal, Travel
Home Office use - Including WFH hours
- Equipment Purchases – Computer, Phone, etc.
- Subscriptions & Registrations
- Study Costs
- Stationary & Printing
- Donations made to eligible charities
- Prior year accounting and Tax agent costs
- Income Protection
- Personal Super contributions



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