



2024 Income Tax Return – Drop and Go

Individual Checklist

Please use this checklist and include any relevant information in the enclosed envelope. This can be popped in the mail or dropped off at your convenience. We will then endeavour to process and email you the result.

Name: _____

Email: _____

Mobile: _____

Preferred method of contact Email Mobile

INCOME

- Payment Summaries and Income Statements (** Will generally be available via ATO Portal)
- Lump Sum and Termination Payment Summaries
- Government payment statements, if received
- Interest income from banks and building societies
- Dividend statement for dividends received or reinvested
- Annual Tax Statements from Managed Funds
- Other income:
 - o Rental Property (see over)
 - o Business
 - o Foreign Income
 - o Capital Gains
 - o Employee Share Schemes

DEDUCTIONS

- Work related expenses
 - o Motor Vehicle
 - o Travel (fares and accommodation)
 - o Uniforms/Work-wear
 - o Self-education and professional development
 - o Union, journals, tools, subscriptions and memberships
 - o Home office, seminars, conferences
 - o Telephone, computer, internet
 - o Any other costs incurred earning income
- Donations to charities or building funds
- Income protection insurance
- Personal Superannuation Contributions

OFFSETS AND REFUNDS

- Private Health Insurance Annual Statement
- IAS statements or details of PAYG instalments paid
- Spouse details including taxable and exempt income
- HELP Debt statement/balance owing
- Spouse Super Contribution

RENTAL PROPERTY

- Total rental income earned
- All rental expenses
- Tax depreciation schedule
- If purchased during the year, we require
 - o Contract for sale
 - o Settlement statement
 - o Bank loan setup fees
- Loan statements 1/7/23 - 30/6/24

TAX REFUNDS - the Tax Office no longer issues refunds by cheque so you must provide us with your bank account details, including the BSB and Account Number.

Call 88211033 or email admin@mongertax.com.au to discuss