

X-Tax Checklist

Freelancers



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

Freelancer Deductions

- Work related software and computer accessories, Tablet, computer and mobile phone expenses
- Purchase, maintenance and repair costs of work-related tools and equipment
- Home office expenses
- Internet expenses
- Interest on business related loans
- Marketing and tech expenses (IT, advertising, websites etc.)
- Personal car expenses (work use % only)
- Licenses, permits and certifications
- Professional libraries, journals and subscriptions
- Insurances
- Purchase and laundering costs of uniforms (with your logo on)
- Protective items (protective clothing, footwear, sunscreen, goggles, etc.)
- Job related self-education expenses

Work and other Expenses

- Personal car expenses (Est of km's if no logbook kept, otherwise logbook and all expense items.)
- Travel expenses (parking, tolls, 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
- Last year's tax return fee
- Income protection insurance premiums (paid outside of Superannuation)
- Investment expenses (Eg: bank fees, financial advisor's fees, investment borrowings etc.)
- Donations

Other Information

- Records of sales and purchases of any shares, business or property
- Private health insurance details
- Spouse details including D.O.B and estimated taxable income
- Children's details including D.O.B and evidence of any Centrelink benefits
- Details of any government debts (Child support, Centrelink ATO debt including previously written off debt)



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