



Checklist for Retail Staff

Income

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

Retail Staff Deductions

- ✓ Purchase and laundering costs of compulsory uniforms (or items with company logo)
- ✓ Purchase costs of protective clothing (aprons, gloves, protective shoes/boots, etc.)
- ✓ Purchase costs of equipment (stationery, diaries, laptop, samples, etc.)
- ✓ Leasing costs of work-related tools and equipment
- ✓ Repair and maintenance costs of work-related tools and equipment
- ✓ Interest on loans taken out to purchase work-related equipment
- ✓ Job-related self-education expenses (course fees, equipment, etc.)
- ✓ Association and membership fees
- ✓ Accommodation and meal expenses when working/training away from home
- ✓ Travel and car expenses
- ✓ Home office expenses
- ✓ Manuals, catalogues, and subscriptions

Work and other Expenses

- ✓ Personal car expenses (estimate of km if no logbook kept, otherwise logbook and all expense items)
- ✓ Travel expenses (parking, tolls, flights, taxis/Uber, train and bus fares for training courses, trade fairs, etc.)
- ✓ Accommodation costs while working away from home
- ✓ Phone costs (for work usage)
- ✓ Percentage relating to work of computer/laptop expenses (lease or purchase)
- ✓ Percentage relating to work 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 (e.g. bank fees, financial advisor fees, investment borrowings, etc.)
- ✓ Donations

Other Information

- ✓ Records of sales and purchases of shares, business, or property
- ✓ Private Health Insurance details
- ✓ Spouse details including DOB and estimated taxable income
- ✓ Child(ren)'s details including DOB and evidence of any Centrelink benefits
- ✓ Details of any government debts (Child support, Centrelink ATO debt including previously written off debt)