

Be well prepared for your appointment by following the checklist details for some of the documents and information we will ask you about when preparing your income tax return. Check the list and bring all relevant information with you.

INCOME

- Tax file number
- Payment summary(s)
- Lump sum and termination payment summaries
- Government payment statements, if received
- Interest income from bank and or building society statements
- Dividend statements for dividends received or invested
- Annual Tax Statements from managed funds
- Other income. Including:
 - Rental properties
 - Business
 - Foreign income
 - Capital gains
 - Employee share schemes

DEDUCTIONS

- Donations to charities or building funds
- Income protection insurance
- Work-related expenses. Including:
 - Motor vehicle
 - Travel (fares and accommodation)
 - Uniforms / work-wear
 - Self-Education & professional development
 - Union, registrations, tools, subscriptions, memberships
 - Home office, seminars & conferences
 - Telephone, computer, internet

Any other costs incurred while earning income

OFFSETS & REFUNDS

- Health insurance and rebate entitlement statement
- IAS Statements or details of PAYG instalments paid
- Spouse details, including taxable and exempt income
- Please also bring your bank account details including BSB and Account number.

Mark off the information and bring this checklist to your appointment

