



Your Handy Tax Checklist

We've made it easy to make sure you don't miss out on any deductions this tax time. Just use our handy tax checklist to prepare for your appointment with us.

INCOME

- ☐ Payment Summaries and Income Statements
- ☐ Lump Sum and Termination Payment Summaries
- ☐ Government payment statements, if received
- ☐ Interest income from banks and building societies
- ☐ Dividend statements for dividends received or reinvested
- ☐ Annual Tax Statements from Managed Funds

OTHER INCOME

- ☐ Rental properties (Provide Income, Expenses & Depreciation Schedule.)
- ☐ Business (Provide Income & Expenses)
- ☐ Foreign income, Pensions, Dividend Income
- ☐ Capital gains (Provide Purchase & Sale Documents)
- ☐ Employee share schemes (Provide Documents)

DEDUCTIONS (Work related expenses)

- ☐ Prior Year Depreciation Schedule (New Clients)
- ☐ Motor vehicle
- ☐ Travel (fares and accommodation)
- ☐ Uniforms/Work-wear
- ☐ Self-education and professional development
- ☐ Union, registrations, tools, subscriptions, memberships
- ☐ Home office, seminars, conferences
- ☐ Telephone, computer, internet
- ☐ Any other costs incurred earning income
- ☐ Donations to charities or building funds
- ☐ Income protection insurance (Not Paid to a Super Fund)
- ☐ Personal Contributions to a Super Fund

OFFSETS AND REFUNDS

- ☐ Health insurance and rebate entitlement statement
- ☐ IAS statements or details of PAYG instalments paid
- ☐ Spouse details including taxable and exempt income

TAX REFUNDS

Remember to bring your bank account details, including the BSB and account number with you to your appointment.

Any questions?

Don't hesitate to call us on
07 4775 7355