

Your Handy Tax Checklist

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
- ☐ Annual Tax Statements from Managed Funds

OTHER INCOME

- ☐ Rental properties
- ☐ Business
- ☐ Foreign income
- ☐ Capital gains
- ☐ Employee share schemes

DEDUCTIONS (Work-related expenses)

- ☐ 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

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. You can also take advantage of our Fee from Refund service, if you receive a refund.

Any questions? Don't hesitate to call us on 0417 121 041