

Individuals

Income Tax Return Checklist

The following checklist details some of the documents and information that we will ask you about when preparing your Income Tax Return.

You can email, post or fax your information to us along with your contact phone numbers and suitable times for us to contact you. We can also come to you.

Income

- Payment Summaries
- 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
 - Business
 - Foreign income
 - Capital Gains
 - Employee Share Schemes

Deductions

- Work related expenses:
 - Motor vehicle
 - Travel (fares & accommodation)

- Uniforms/work-wear
- Self-education and professional development
- Union, registrations, tools, subscriptions, memberships
- Home office, seminars and 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

Our fee for preparing your tax return is **fully tax deductible** and we can take our fee from your refund.

Tax Refunds – the Tax office no longer issues refunds by cheque so you must bring your bank account details, including the **BSB and Account Number** with you to your appointment.

Appointment Details

Day: _____ **Date:** _____

Time: _____ **Call today on**

We can process your return without you having to travel to our office.