

Checklist of important documents required for preparing a Tax Return

INCOME

(Enclosed)

- Tax File Number ()
- Year End Payment Summaries (PAYG) ()
- Employment termination payments ()
- Details of spouse and spouse taxable income ()
- Interest received from banks. ()
- Rental annual statement for investment properties ()
- Dividend statements ()
- Annual share trading statement ()
- Annual statements from managed investment funds ()
- Foreign Pensions or Foreign Income received ()
- Any other Income ()
- Last year tax return ()
- Bank details for refund (BSB and Account Number) ()

DEDUCTIONS

- Year-end private health insurance details from Insurance Company ()
- For Rental Property: Annual interest charged on Loan account, ()
Repair and other expense receipts. ()
- Annual statement from Investment, Trust or Managed Fund ()
- Log book for vehicle used for work purposes ()
- Expense receipts for vehicle used for work purposes ()
- Receipts for work related travel expenses ()
- Receipts for tools, equipment and uniform for work purposes ()
- Education related expenses ()
- Fee paid for lodgement of last year Income Tax Return ()
- Child support payments ()
- Gifts or donation receipts if any ()
- Any other expenses for work purposes. ()