

Income Tax Return Checklist

Must haves

- ✓ Bank Details for your refund to be paid into (The ATO no longer issues cheques for income tax refunds)
- ✓ Private Health Fund Statements
- ✓ Photo ID (if this is the first year you are doing your tax return with us)

To assist us in reporting your income correctly, please bring along the following documents if they apply to you:

- Payment Summaries
- Lump Sum and Termination Payment Summaries
- Government payment statements
- Interest income from banks and building societies
- Dividend statements for dividends received or reinvested
- Annual Tax Statements from Managed Funds
- Rental Income
- Business Income
- Foreign income
- Capital Gains records including purchase and sale records
- Employee Share Scheme notices including details of new shares issued and any shares which have vested during the current year

To assist us with making the most of your tax deductions, can you please bring along your receipts for the following:

- Motor vehicle expenses
- Travel (fares & accommodation)
- Uniforms and protective clothing
- Self-education and professional development
- Union Fees
- 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
- Accounting fees paid
- Business Expenses
- Rental Property Expenses including
 - Council Rates
 - Water Charges
 - Insurance
 - Interest on loans
 - Borrowing Expenses
 - Property Agent Fees
 - Repairs & Maintenance
 - Depreciation and Building Write off

Other information to bring along

- Spouse's income details
- A copy of last years income tax return (if we did not prepare this)

If you are running a bit short on time or are not able to travel to see us, we can process your return for you if you wanted to email or post your information to us. We can then contact you to discuss any questions for this year and provide you with any suggestions for what you can do to maximise your refund next year.