

Your Tax Checklist

INCOME

- Payment summaries and income statements
- Pensions or government payments/allowances
- Interest income from banks and building societies
- Dividend statements
- Annual Tax Statements from Managed Funds

OTHER INCOME

- Details of rental property income
- Details of any business income
- Details of any foreign income
- Details of any other income earned

WORK RELATED DEDUCTIONS

- Personal car expenses
- Travel (fares and accommodation)
- Uniforms/work-wear
- Phone costs (for work usage)
- Self-education and professional development
- Home office running expenses
- Income protection insurance
- License and association fees
- Donations to charities or building funds
- Any other costs incurred earning income

OTHER DEDUCTIONS

- Last year's tax return fee
- Rental property expenses
- Investment expenses
- Health insurance and rebate entitlement statement
- Records of sales and purchases of any shares, business or property
- Spouse details
- Children's details
- Details of any government debts
- Charity donations



Need help?
Give us a call on
1800 835 626