

TAX HELP CHECKLIST

To save you time and frustration, please use the below checklist to help you get together the information you require, so we can help you better.

GENERAL

- Last year's income tax return (new clients only)
- Details of any purchases or sale of shares/property/business
- Private health insurance details
- Spouse's taxable income
- Children's details including D.O.B and whether you currently receive any centrelink benefits

INCOME

- PAYG payment summaries (group certificates)
- Pensions or government payments/allowances
- Interest earned for the relevant year from the banks, building societies etc
- Dividend statements
- Details of any rental property income
- Details of any business income

EXPENSES

- Work related expenses (tools/education/uniform/union fees)
- Motor vehicle expenses (estimate of kilometres if no logbook kept, otherwise logbook and all expense items)
- Travel expenses
- Investment expenses (bank fees/ financial advisors fees/investment borrowings etc)
- Rental property expenses (rates/property agents/insurance/interest/repairs and maintenance etc)
- Donations
- Cost of managing tax affairs

PS. Please bring along this information on the day