



TAX RETURN CHECKLIST

Individual Tax Return

- PAYG Payment Summary
(We only have access to this information once your employer has lodged the details to the ATO)
- Payment Summaries for all Centrelink/Government Payments - new start allowance and/or pensions
- Lump Sum & Termination Payment Statements
- Interest earned from bank accounts
- Share Dividend Statements (buy and sell statements)
- List of work-related expenses - uniform, union fees, travel, home office, tools, stationery, work related study expenses
- Motor vehicle logbook and expense receipts
- Donations to charities
- Income protection, sickness, and accident insurance
- Private Health Insurance tax statement
- Spouse date of birth and taxable income
- Fee's charged for previous year's tax return (if done somewhere else)

Business/ Sole Trader

- Business Income and Expenses including Vehicle Expenses
- Superannuation Contributions (please supply Intent to Claim form)
- Bank statements

Rental Properties and Investments

- Rental Income (annual agent statement)
- Bank statements for loans
- Repairs and improvement expenses
- Purchase or sale documents
- Other expenses - insurance, cleaning, gardening, council rates, water, electricity, and emergency service levy

Please make sure you update our office with your current contact details including residential address, email address, mobile number, and bank account details.

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