

YOUR HANDY TAX CHECKLIST

We've made it easy to make sure you don't miss out on any deductions this tax time. Just use our handy tax checklist to prepare for your appointment with us.

INCOME

- Payment Summaries
- Lump Sum & Termination Payment Summaries
- Government Payment Statements if received
- Interest income from banks and other investments
- Dividend statements for dividends received or reinvested
- Annual Tax Statements from Managed Funds

OTHER INCOME

- Rental Properties
- Business
- Foreign Income
- Capital Gains
- Employee Share Schemes
- Uber/Air BNB

DEDUCTIONS

- Motor Vehicles
- Travel (fares & accommodation)
- Uniforms/Work wear
- Self Education and Professional Development
- Union, professional registrations, subscriptions, memberships
- Home Office, seminars, conferences
- Telephone, computer, internet
- Any other costs incurred to earn income
- Donations to registered charities
- Income protection

OFFSETS & REFUNDS

- Health Insurance and rebate entitlement statement
- IAS Statements or details of PAYG Instalments paid
- Spouse details including taxable and exempt income

TAX REFUNDS

Remember to bring your bank account details, including the BSB and Account Number with you to your appointment

Do not hesitate to call us on 07 3470 1111

