

Tax Checklist

to assist you with your Tax Return Appointment

Income Statements

- PAYG Payment Summaries (previously Group Certificates) – you should be provided with a copy from your employer
- Payment summaries / Group certificate
- Eligible termination payments
- Interest earned from bank accounts
- Share dividend statements
- Annual tax statements from trusts, managed investments, property and cash management trusts
- Income and expenses from investment properties

Deductions & Expenses

- A list of work-related expenses (with receipts) – including your motor vehicle log
- Receipts of charitable donations
- Interest and fees on investment loans
- Fee charged for previous year's tax return
- Income protection insurance
- Sickness and accident insurance
- Private health insurance
- Any extra superannuation contributions
- Amount of HELP debt or Financial Supplement loans outstanding
- Out of pocket medical expenses for disability aids in excess of \$2,265

Personal Details

Bring the details of you and your spouse, including your:

- Date of birth
- Taxable income
- Bank account details for your refund