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## Your Tax Checklist

We've prepared this handy checklist of documents you will need to bring along for your tax appointment

Client Name:

### Income

- Payment Summaries and Income Statements
- Lump Sum and Termination Payment Summaries
- Government payment statements, if received
- Interest income from banks and building societies
- 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

### Any questions?

Don't hesitate to call us on **02 4933 6888**



*Liability limited by a scheme approved under Professional Standards Legislation*

### Income (Work related expenses)

- Motor vehicle
- Travel (fares and accommodation)
- Uniforms/work-wear
- Self-education and professional development
- Union, registrations, tools, subscriptions, memberships
- Home office, seminars, conferences
- Telephone, computer, internet
- Any other costs incurred earning income
- Donations to charities or building funds
- Income protection insurance

### Offsets and 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.