



Appointment

Date: _____

Time: _____

Income Tax Return Checklist – Individuals

The following checklist details some of the documents and information that we will ask you about when preparing your Income Tax Return. Please check the list and **bring any relevant information with you as we cannot be sure when the Australian Tax Office Portal will have these details available.**

<p><u>Income</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Payment Summaries <input type="checkbox"/> Lump Sum and Termination Payment Summaries <input type="checkbox"/> Government payment statements, if received <input type="checkbox"/> Interest income from banks and building societies <input type="checkbox"/> Dividend statements for dividends received or reinvested <input type="checkbox"/> Annual Tax Statements from Managed Funds <input type="checkbox"/> Other income: <ul style="list-style-type: none"> <input type="checkbox"/> Rental properties <input type="checkbox"/> Business <input type="checkbox"/> Foreign income <input type="checkbox"/> Capital Gains <input type="checkbox"/> Employee Share Schemes 	<p><u>Deductions</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Work related expenses: <input type="checkbox"/> Motor vehicle <input type="checkbox"/> Travel (fares & accommodation) <input type="checkbox"/> Uniforms/work-wear <input type="checkbox"/> Self-education and professional development <input type="checkbox"/> Union, registrations, tools, subscriptions, memberships <input type="checkbox"/> Home office, seminars and conferences <input type="checkbox"/> Telephone, computer, internet <input type="checkbox"/> Any other costs incurred earning income <input type="checkbox"/> Donations to charities or building funds <input type="checkbox"/> Income protection insurance
<p><u>Offsets and Refunds</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Health insurance and rebate entitlement statement <input type="checkbox"/> IAS statements or details of PAYG instalments paid <input type="checkbox"/> Spouse details including taxable and exempt income 	

Don't forget our fee for preparing your tax return is fully tax deductible.

Tax Refunds – the Tax office no longer issues refunds by cheque so you must bring your bank account details, including the **BSB and Account Number** with you to your appointment.

We can process your return without you having to travel to our office. You can email or post information to us along with your contact phone numbers and suitable times for us to contact you.

Maximum Refund with Maximum Confidence.