

# Tax Checklist for Individuals

Just use our handy tax checklist to prepare for your appointment with us.

## 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

## WORK RELATED DEDUCTIONS

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

## REFUNDS & OFFSETS

Health insurance and rebate entitlement statement

IAS statements or details of PAYG instalments paid

Spouse details including taxable and exempt income

## REFUNDS & OFFSETS

Remember to bring your bank account details, including the BSB and account number with you to your appointment. You can also take advantage of our Fee from Refund service, if you receive a refund.

## Any questions?

Don't hesitate to call us on  
**0404 241 111**