Individual Tax Return Checklist

When you come in to see us at tax-time, please bring the following items to assist us in completing your tax return quickly.

Income Sources
Payment summaries
Interest on Bank Accounts
Deductible amount for pensions/ annuities
Trust distribution statements
Tax statements from Fund managers
Share dividend statements
Tax statements from stockbrokers
Income stream statements
Life insurance Bonus Policy statements
Employee Share Scheme documents
Capital Gains Tax statements including share documents
Lump sum payments e.g. Eligible Termination Payment statements
Centerlink payments e.g. pensions, allowance statements

Employment income deductions
Work Related Expenses e.g. uniforms/travel/union fees/phone/tools
Donations

Investment related deductions
Interest / fees on borrowing for investment purposes (bring statements
Asset purchase / sale agreements

Other deductions
Superannuation if self employed
Receipts of gifts/ donations to charity
Receipts of self education expenses e.g. books, computer costs, car expenses
Financing lease statements
Income Protection premiums (bring statements)

Offsets
Spouse contributions to superannuation
Superannuation pension rebates
Private health insurance statement
Medical receipts (if spent more than $2,250)
Imputation credit information from dividend statements

Other useful information
Bank statements (with account name and number, BSB number)
Previous year's accountants fees
Last year's tax return
Prior year tax losses