

## INDIVIDUAL TAX TIME DOCUMENTS NEEDED

Please use this checklist to upload all documents to your secure client portal

### INCOME

- Payment summaries
- 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
- Prior year tax return
- Other income:
  - Rental properties (see attached schedule)
  - Business (ABN) please invite us to your data file / provide reports or schedule
  - Foreign income and any foreign taxes paid
  - Capital gains (sale document and purchase documents)
  - Employee share schemes

### DEDUCTIONS

- Work related expenses (for example):
  - 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
- Tax Agent fee from prior year tax return

### 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** - the Tax Office no longer issues refunds by cheque so you must check your bank account details, including the BSB and account number and advise any changes to us.