

## Tax Return Checklist

### ***Income Earned***

- Payment Summaries (Group Certificates)
- Bank account interest earned
- Managed fund annual taxation summaries
- Dividend statements (cash and/or dividend reinvestment)
- Capital gains (shares) – details of shares bought & sold
- Capital gains (property) – copies of settlement statements for sale and purchase along with other costs of selling

### ***Employment Deductions***

- Details of work km's travelled if claiming less than 5,000 kms
- Other work related travel
- Self-education costs
- Uniform costs
- Other work related costs such as union fees, work use of mobile, subscriptions to associations or unions; tools and equipment, computer related costs, seminars or courses; details of any hours worked at home

### ***Other Deductions***

- Receipts for donations
- Income protection (sickness and accident) insurance premiums
- Tax agent fees (if new to the firm)
- Superannuation (if self-employed)
- Interest/fees on borrowing for investments

## ***Investment Property***

Details of when property was rented, including rental or agents (annual) statements

Bank Fees

Water Rates

Council Rates

Land Tax

Details of repairs

Interest

Advertising

Insurance

Body Corporate/Strata Levies

Gardening/lawn mowing fees

## ***Other***

Private Health Insurance annual taxation statement

Partners Taxable Income (if we are not preparing tax return)

Bank account details (in case of tax refund)