

# Individual Tax Return CHECKLIST

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Accounting & Tax Matters

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## Income

- Tax file number
- Payment summaries/income statements
- Lump sum/termination payment summaries
- Government payment statements
- Income from interest from all accounts
- Dividend statements
- Annual tax statements from Managed Funds

## Other Income

- Rental Properties
- Business income
- Foreign income
- Capital gains
- Employee share schemes
- Details of any other income you've received during the financial year

## Deductions

\*Please bring all receipts where possible

- Motor vehicle
- Travel (fares/accommodation)
- Uniforms/work-wear
- Self-education/professional development
- Union fees/registrations/subscriptions
- Phone/computer/internet/home office
- Donations
- Income protection insurance

## Other Important Information

- Private health insurance statement
- IAS statements/details of PAYG instalments paid
- Spouse details, including taxable income
- Bank Details



**Any questions? Feel free to  
get in touch before  
your appointment**