

## TAX HELP CHECKLIST

To save you time and frustration, please use the below checklist to help you gather the information we require:

### GENERAL

- Last year's income tax return (new clients only)
- Private health insurance details
- Bank Account details (for tax refund purposes)
- Spouse's taxable income

### INCOME

- PAYG payment summaries (group certificates)
- Pensions or government payments/allowances
- Interest earned for the relevant year from all banks, building societies etc
- Dividend statements

### EXPENSES

- Work related expenses (tools, education, uniform, union fees)
- Motor vehicle expenses (estimate of work related kms travelled - if no logbook kept otherwise logbook and all expense items)
- Travel expenses
- Gifts/Donations
- Cost of managing tax affairs

### OTHER

- Details of any rental property income and expenses (rates, property agents fees, insurance, interest, repairs and maintenance etc.)
- Details of all business income and expenses
- Details of any purchases or sale of shares/property/business (in particular, buy and sell contracts)
- Investment income and expenses (bank fees, financial advisors fees, investment borrowings etc.)