

WHAT TO BRING TO YOUR TAX APPOINTMENT

NEW CLIENTS ONLY

- Your most recent Tax Return and
- Notice of Assessment ([What does this look like?](#))

INCOME

- Payment summaries for **salaries and wages** ([view sample](#)) ([view sample paper version](#))
- Allowances** (eg entertainment/car / travel / uniform / laundry / meals)
- Lump sum **termination payments** ([view sample](#))
- Government pensions and allowances
- Payment summaries for **superannuation income streams** ([view sample](#)) or other pensions
- Payment summaries for **superannuation lump sum** payments ([view sample](#))
- Interest** (tip: check internet banking) and **dividends** ([view sample](#))
- Payment summary for **employee share plans** ([view sample](#)) or other pensions
- Distributions from **partnerships** or **trusts**, including **managed funds** ([view sample](#))
- Details of **investment assets sold**, such as shares or real estate

WORK EXPENSES

- Use of own motor vehicle for business travel
- Other business travelling expenses (car parking, road tolls, accommodation)
- Purchasing of protective clothing or uniforms
- Sun protection expenses
- Self education expenses (related to your current job)
- Home office running expenses
- Telephone expenses
- Depreciation of library, tools, business equipment, percentage of home computer
- Tools of trade
- Subscriptions to trade magazines
- Union membership

EXPENSES RELATING TO INVESTMENT INCOME

- Account keeping fees
- Ongoing management fees
- Interest on borrowing to buy shares
- Advice relating to changing and managing investments (but not setting them up)
- Investment publications (e.g. financial review, magazines, not ordinary newspapers)

EXPENSES – OTHER

- Donations
- Income Protection Insurance Premiums (not claimable if policy is held in super)

RENTAL PROPERTIES

Key documents required

- Rental Summary [from agent](#) – or if not using an agent, your record of rent received
- Interest paid (most banks will provide a total online or on your June bank statement)
- Depreciation report from a quantity surveyor
- Repairs and maintenance (itemised list with receipts)

It is important to itemise repairs & maintenance so we can distinguish between amount that are immediately deductible and amounts that must be written off over time ([find out more](#))

Other expenses (please summarise these)

- | | |
|---|--|
| <input type="checkbox"/> Advertising | <input type="checkbox"/> Cleaning, gardening, pest control |
| <input type="checkbox"/> Council/water rates | <input type="checkbox"/> Insurance |
| <input type="checkbox"/> Property agent fees | <input type="checkbox"/> Printing, postage and stationery |
| <input type="checkbox"/> Travel (e.g. to inspect property, visit agent etc). For car travel, estimate total km. | |

ADDITIONAL INFORMATION WHERE APPLICABLE

- Contact details, if changed from last year
- Bank Account details (BSB, Account Number and Account Name) – For your refund
- Remote zone allowance (if you lived in a remote area)

Details of place and number of nights stayed

- Private health cover statement
- Medical expense details if net expenses exceed \$2,000
- Spouse details ([read the tax definition of spouse](#))

Date of birth, taxable income, fringe benefits, reportable super contributions

- Dependent details, DOB and separate net income
- Any other information that you may consider relevant