

What you need to bring to your appointment to complete your Tax Return + Rental Property

(Please ensure you have all of this information with you, so we can lodge your Tax Return straight away)

- Your bank account details (BSB: _____ - _____ Account no: _____)
- A copy of last years tax return (new clients only)
- PAYG payment summary(s)
- Record of any paid parental leave payments
- Contract or self-employment income
- Centrelink payment summary (newstart, sickness or special benefits, austudy, pensions or other benefits)
- Details of funds withdrawn from superannuation or redundancy payments (etp payment summary(s))
- Dividend statements (x2) &/or trust tax statement(s)
- Trust distributions income from other entities or expenses
- Employee share scheme letter
- Details of work related expenses eg;
 - ✓ Car - If you are sending an Excel spreadsheet or list of expenses, please make a declaration on the bottom of the list or in a separate email stating **“I confirm that I am holding all the receipts for the expenses I am claiming in tax return”**.**Include log book and details of car expenses incurred.
 - ✓ Travel - If you are sending an Excel spreadsheet or list of expenses, please make a declaration on the bottom of the list or in a separate email stating **“I confirm that I am holding all the receipts for the expenses I am claiming in tax return”**. **Include travel diary / details of travel incl. date, who visited, what for, cost incurred.
 - ✓ Special work clothes and care of same
 - ✓ Self education
 - ✓ Union/professional fees
 - ✓ Stationery – telephone
 - ✓ Tools, briefcase, journals, etc.
 - ✓ Home office expenses
 - ✓ Phone & internet usage diary to be kept
- Details of travel between home & work for transport of heavy and bulky tools and equipment (Recommended to use 20kg as a rule of thumb and also established a secure storage place for equipment)
- Gifts/donations to charities or school building fund
- Spouse's income details

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- Medical expenses (if out of pocket expenses > \$2000) eg medical, dental, optical, prescription, physio expenses paid for the year net of any health benefit refunds. (note: you may not be entitled to claim depending on your individual circumstances as this is being phased out.)
- Private health insurance tax statement + details of whom this covers (eg yourself, partner, any dependents including your own children, foster children or children whom are in your care) ** PLEASE check with Medicare as your whole family may not be fully covered.
- Full details of purchase and sale (Property, Shares etc.), if you have sold any item and made a capital gain or loss
- Bank/loan statements (including savings, overdrafts, personal loans, housing loans etc)
- Details of any bank interest received
- Copy of your bank account details (bsb & account numbers) for crediting refunds
- General insurance policies
- Personal insurance policies
- Superannuation statements
- Income protection / sickness insurance
- Rental income and expenses
 - ✓ annual agent statement or details of rents received for the full year
 - ✓ bank loan statements
 - ✓ rates/ strata levies/ repairs/ insurance expense details
 - ✓ details of any property inspections made e.g. car travel KLMS or
 - ✓ air flights and accommodation
- Rental property purchase documents (if not provided previously)
 - ✓ air flights and accommodation
 - ✓ purchase contract
 - ✓ legal settlement statement
 - ✓ quantity surveyor's depreciation and capital allowances report
 - ✓ financing details including total amount borrowed and terms
 - ✓ ownership of the property e.g. self 90% spouse 10%
 - ✓ date property first available for rent
 - ✓ date property first rented

*****Please confirm that you have provided all necessary information / receipts / payment summaries prior to commencement of your tax work. If all information is not provided up front, an extra fee may be incurred as amendments would need to be made.***

If you are not sure about something, bring it along anyway.

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