What you need to bring to your appointment to complete your tax return

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 Numbers) for a speedy refund
- ☐ A copy of last years tax return (new clients only)
- ☐ PAYG payment summary(s)
- ☐ 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- ☐ Details of funds withdrawn from superannuation or redundancy payments (etp payment summary(s)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)
- ☐ Employee share scheme letter
- ☐ Details of work related expenses eg;
  - ✓ car
  - ✓ special work clothes and care of same
  - ✓ travel
  - ✓ self education
  - ✓ union/professional fees
  - ✓ stationery – telephone
  - ✓ tools, briefcase, journals, etc
  - ✓ home office expenses
  - ✓ diary for both phone & internet usage
- ☐ Gifts/donations to charities or school building fund
- ☐ Spouse's income details
- ☐ Private health insurance tax statement
- ☐ 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
- ☐ General insurance policies & Personal insurance policies
- ☐ Superannuation statements

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

Liability limited by a scheme approved under Professional Standards Legislation.