

**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- ☐ Details of funds withdrawn from superannuation or redundancy payments (etp payment summary(s))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
- ☐ Rental property purchase documents (if not provided previously)
  - ✓ 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.**

Liability limited by a scheme approved under Professional Standards Legislation.



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