



## Tax Appointment Checklist

- Tax File Number & Photo ID
- Bank Details (for deposit of refund)

### **INCOME**

- Payment Summaries  
If they are on myGov/ATO Portal, we can access them.
- Final pay slip - Electronic or paper copy  
(if income not finalized on myGov)
- Super Lump Sum or Super Stream Payment Summaries
- Interest and Dividends
- Managed Fund / ETF

### **ADDITIONAL INCOMES**

- Rental income & Rental Expenses
- Business income & Business Expenses
- Capital Gains – sales of any investments (rental properties, shares, cryptocurrency)
- Other income (foreign income, employee share schemes, etc.)

### **ADDITIONAL ITEMS**

- Private Health Insurance Statement  
(especially if doing your return in July)
- Spouse's taxable income  
(or reasonable estimate)

### **DEDUCTIONS**

- Motor vehicle expenses  
(logbook or cents/km – diary)
- Tolls and Parking Costs
- Interstate and Overseas Work-related Travel  
(such as accommodation, airfares and meals)
- Uniforms, PPE & Boots
- Courses and Training for Work /  
Professional Development
- Memberships, Registrations/Licenses  
and Union Fees
- Tools, Equipment and Consumables
- Laptops, Tablets, Phones
- Computer Accessories  
(mice, keyboards, headsets)
- Mobile, Internet and Home office
- Donations
- Tax Return costs from last year
- Personal Super Contributions  
(be sure to provide your super company with a  
Notice of Intent to Claim form beforehand)
- Income Protection Insurance  
(separate to those in your super)