

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, Sun protection.
- ☐ Courses and Training for Work / Professional Development
- ☐ Memberships, Registrations/Licenses and Union Fees
- ☐ Tools, Equipment and Consumables
- ☐ Laptops, Desktops, Tablets, Phones
- ☐ Computer Accessories
(mice, keyboards, headsets, docks, hard drives)
- ☐ Mobile, Internet, Stationery OR 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)