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My Tax Checklist

Name: _____

Date: _____

Appointment time: _____

What do I need to bring to spend my time more effectively with my accountant?

Income

Y/N

- PAYG Summaries (Group Certificates)
- Interest from bank accounts
- Dividend statements
- Managed fund statements
- Any other income (Such as income protection payments)

Notes (Use this to tell your accountant if you sold shares or any other changes or questions you may have)

Expenses

Y/N

- Travel (If over 5000k's need all costs of running vehicle)
- Work expenses
- Phone
- Union
- Travel and accommodation for conferences
- Stationery
- Computer items
- Donations
- Accounting fees
- Income protection insurance

Notes (Use this to ask your accountant any questions and feel free to PTO)