



What do I need to bring to my accountant appointment to ensure my time is spent most effectively?

My Tax Checklist

Name: _____

Appointment with: _____

Date: _____ Appointment time: _____

- Interest earned for the relevant year from banks, building societies etc.
- Dividend statements
- Shares and property sales and associated purchase documentation
- Managed fund statements
- Details of rental property income and expenses
- Details of any business income and expenses
- Details of any other income earned
- Personal car expenses, logbook if over 5000km, and receipts of all expense items
- Clothing expenses (such as work wear, uniform, safety gear, dry cleaning, protective clothing)
- Phone (for work usage)
- Home office expenses (stationery, computer items)
- Work related self-education expenses
- Memberships, licences and registrations
- Union fees
- Travel and accommodation and accommodation costs while working away from home
- Donations
- Accounting fees
- Income protection insurance
- Personal super contributions