Jim Pickersgill and Associates

Making the most of my appointment with my accountant?

My Tax Checklist

Name: _____

Appointment with: _____

Date: _____ Appointment time: _____

The privacy and security of your personal information is imperative to us.

We kindly request that you do not send any sensitive or personal information via email. Documents can be securely uploaded to us through our website's submission portal located at the bottom of the opening page: https://jpickersgill.com.au/, provide in person to our office, or via after hours box (located at the front door).

- ☐ Interest earned for the relevant year from banks, building societies etc.
- ☐ Dividend statements
- ☐ Shares and property sales and associated purchase documentation
- ☐ Cryptocurrency 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, licenses, and registrations
- ☐ Union fees
- ☐ Travel and accommodation and accommodation costs while working away from home
- ☐ Donations
- ☐ Accounting fees
- ☐ Income protection insurance – Annual statement
- ☐ Personal super contributions – Acknowledgement of Notice of Intent to claim form