

Tax checklist



We've made it easy to make sure you don't miss out on any deductions this tax time. Just use our handy tax checklist to prepare for your appointment with us.

Income

- ☐ Payment Summaries and Income Statements
- ☐ Lump Sum and Termination Payment Summaries
- ☐ Government payment statements, if received
- ☐ Interest income from banks and building societies
- ☐ Dividend statements for dividends received or reinvested
- ☐ Annual Tax Statements from Managed Funds

Other income

- ☐ Rental properties (including Airbnb, Stayz, etc.)
- ☐ Business (including sharing economy income, e.g., Uber, Airtasker)
- ☐ Foreign income
- ☐ Capital Gains (including cryptocurrency gains)
- ☐ Employee share schemes

Deductions (work-related expenses)

- ☐ Motor vehicle
- ☐ Travel (fares and accommodation)
- ☐ Uniforms/workwear
- ☐ Union, registrations, tools, subscriptions, memberships
- ☐ Self-education (Not usually applicable for international students)
- ☐ Professional development, seminars, conferences
- ☐ Working from home, including telephone, computer and internet
- ☐ Any other costs incurred in earning income
- ☐ Donations to charities or building funds
- ☐ Income protection insurance

Offsets and refunds

- ☐ Health insurance and rebate entitlement statement
- ☐ IAS statements or details of PAYG instalments paid
- ☐ Spouse details, including taxable and exempt income

Tax refunds

Remember to bring your bank account details, including the BSB and account number, your TFN and ID with you to your appointment.



Any questions?
Don't hesitate to call us on 02 8313 1747