

## 1. INCOME

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- Group Certificate(s) (PAYG Payment Summaries)
- Pensions, Government Allowances
- Interest earned from any bank accounts (more important than you would think- Please check!)
- Dividend Statements
- Rental Income
- Business Income (Partnership or Sole Trader)
- Lump Sum Payments
- Superannuation Income
- Other Income, (ie Foreign Income)

## 2. EXPENSES

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- Work related expenses; (i.e., Tools, Uniforms, union fees)
- Motor Vehicle expenses; ( inc. estimation of kilometers if no logbook is kept, otherwise logbook and all motor vehicle expenses)
- Travel Expenses
- Investment expenses; (i.e. bank fees, financial advisor fees, investment borrowings)
- Rental Property Expenses; (see extra attachment for complete listing)
- Cost of managing tax affairs - Last year's fee account from accountant
- Charitable donations
- Self-education expenses; (this must be related to your current employment)

## 3. OTHER DETAILS

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- Bank details (any expected refunds- MUST have bank details as the Australian Taxation Office no longer issue cheques)
- Zone offsets- if you live or work in regional areas, dates and areas needed.