



CHECKLIST – INCOME

- ✓ PAYG Payment Summaries (Group Certificates) from all employers and Centrelink (if applicable)
- ✓ Bank interest details
- ✓ Share dividend details/statements
- ✓ Sale of shares – Buy and Sell statements

CHECKLIST – DEDUCTIONS

- ✓ Accountant Fees
- ✓ Motor Vehicle Log Book or Estimate of Work-Related km's travelled
- ✓ Union Fees & Professional Subscriptions
- ✓ Tools of Trade / Computer / Internet
- ✓ Income Protection Insurance
- ✓ Protective Clothing & Uniforms
- ✓ Donations
- ✓ Name
- ✓ Full details on any other relevant deductions

CHECKLIST – OTHER

- ✓ HECS, HELP or SFSS Loan debts
- ✓ Details of any outstanding debts to Govt Departments (ATO, Centrelink, FAO, CSA)
- ✓ Private Health Fund annual summary document
- ✓ Time spent in remote areas (Fitzroy Crossing, East Kimberley, Mitchell Plateau) in days
- ✓ Details on any net medical expenses exceeding \$2,060 for the year
- ✓ Please provide us with a copy of your most recent lodged tax return (new clients only)
- ✓ Bank details for the account you would like your refund paid into.

RENTAL PROPERTY

- ✓ Contact us to provide you with our 'Rental Property Checklist'

BUSINESS INCOME – SOLE TRADER, PARTNERSHIP OR TRUST

- ✓ Contact us to provide you with our 'Small to Medium Business Checklist'