

## Checklist of what to bring with you for your individual tax return appointment

### Income

- PAYG Payment Summaries for all employers throughout the year
- details of any non-cash benefits received including discount(s) on employee shares or rights
- lump sum and termination payments. All documentation should be provided including an ETP Payment Summary from the employer or fund
- Government Social Security payments, including pensions, unemployment and sickness benefits
- details of any CGT asset sales (e.g. shares and real estate). Please include dates of, and costs associated with, acquisition and disposal. (You can save tax if you qualify for the variety of CGT concessions)
- annuities, including allocated pensions or superannuation income streams
- income from trusts and partnerships. Statements of distribution should be provided where appropriate
- interest and dividends received and any tax deducted. Include details of franked dividends (imputation credits)
- foreign source (employment and pension) income and details of any foreign tax credits
- any business/contracting income earned.

### Deductions

- details of work related vehicle usage
- details of any over-night/interstate/overseas travel for work
- uniform or protective clothing purchase/maintenance
- self education expenses relating to your current work
- expenses relating to working from home
- subscriptions/union fees relating to your employment
- tools of trade
- Income Protection Insurance Premiums
- accounting fees for the previous financial year
- donations.

### Other

- private health cover insurance statement
- details of spouse income.

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### Rental property checklist

- agents annual summary listing all rent received & deductions from rent
- if self-leased, details of the weekly/ monthly rent
- details of property ownership (names on title, percentage owned)
- details of any refinancing undertaken throughout the year. (Include loan statements before and after the refinance)
- details of any re-draws made on the mortgage throughout the year
- advertising expenses for tenants
- body corporate/strata fees paid
- cleaning expenses
- council rates
- lawn & garden care expenses
- building/contents/landlord insurance expenses
- land tax paid
- legal costs paid
- pest control fees
- property (real estate) agents fees
- bank fees/charges
- repairs & maintenance on the property
- depreciation schedule for the property
- water rates
- sundry expenses.