



Basic Tax Return Checklist

A Checklist of Information / Documents to bring with you for your appointment

Income

- | | |
|---|--|
| <input type="checkbox"/> PAYG Payment Summary | <input type="checkbox"/> Rental Property Income / Info |
| <input type="checkbox"/> Bank Interest | <input type="checkbox"/> Other Income |
| <input type="checkbox"/> Dividend Income Statements | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> |

Deductions

- | | |
|---|--|
| <input type="checkbox"/> Work related car expenses | <input type="checkbox"/> Other work related expenses |
| <input type="checkbox"/> Work related travel expenses | <input type="checkbox"/> Home office, tools, stationery, telephone/mobile, memberships or subscriptions, |
| <input type="checkbox"/> Uniforms | <input type="checkbox"/> Costs of managing your tax affairs (e.g., last year accountant fees) |
| <input type="checkbox"/> Work related self-education | <input type="checkbox"/> Income Protection |
| <input type="checkbox"/> Donations | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> |

Other

- | | |
|---|---|
| <input type="checkbox"/> Private Health Insurance Statements | <input type="checkbox"/> Medical expenses (e.g., doctor, pharmacy, optical, physio, nursing home fees) If eligible. |
| <input type="checkbox"/> Sale of Investment Information & Documents | <input type="checkbox"/> |

Notes:
