



Maximise your tax refund with our tax checklist for individuals.

REGULAR INCOME:

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

OTHER INCOME:

- Business
- Rental properties
- Capital gains
- Foreign income
- Employee share schemes

OFFSETS & REFUNDS:

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

DEDUCTIONS:

- Uniforms & workwear
- Vehicle
- Travel
- Personal development
- Union, registrations, tools, etc
- Home office
- Telephone, computer, internet
- Donations
- Income protection insurance
- Any other costs incurred earning income

OTHER INCOME:

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YOUR TAX APPOINTMENT:

Don't forget to have your bank account details handy at your appointment. If you prefer, we can also offer a Fee from Refund service should you receive a refund, so you're not out of pocket on the day.

Have a question regarding your individual tax return? Get in touch!