



Tax Return Checklist

You are required to bring the following basic Information to Lodge your Individual Income Tax Returns for the relevant financial year ending 30th June

Current Contact details	
Bank BSB and account number	
Income details such as: <ul style="list-style-type: none">- PAYG Payment Summary- Allowances (Youth, New start)- Interest (Bank and Cash Management Accounts)- Managed Investment (Dividends and Capital)- Share Dividends- Family Trust Distribution- ABN Income- Foreign Source Income and Foreign Assets or Property- Rental Income from Investment Property- Other Income – i.e. Royalties, Scholarships, Grants	
Work related expenses details such as: <ul style="list-style-type: none">- Car and Travel Expenses (log book or documentation must be provided)- Uniform, laundry and protective clothing expenses (Invoices must be provided)- Self-education expenses (Invoices must be provided)- Gifts and Donations to registered charities (Invoices must be provided)- Previous year's Tax agents fee (Invoices must be provided)	
All the Visas and travel information for the relevant financial year ending 30th June is required	
Spouse information such as Name, DOB, TFN and Income details are required	
Private insurance details such as provider name, ID number and Policy Duration is required	
If you are lodging your tax return with us for the first time please bring your identity proof (e.g. passport, drivers licence, etc.)	