

Tax Return Checklist



Things to bring with you when you see us at tax time ...

Income

- Payment Summaries from your Employer/s
- Termination Payment Summaries
- Government Payments or Grants
- Interest (with details of each Account Number and BSB)
- Dividend Statement/s
- Share Sale/s (Require Purchase & Sale Details)
- Trust and Managed Fund Tax Summary
- Partnership or Trust Distributions
- Capital Gains
- Foreign Income
- Business Income
- Other Income

Other Items

- Partner or Spouse Taxable Income
- Child Support Agency payments - paid or received
- Employee Share Scheme Statements
- Vehicle Log Book
- Last year's tax return - *only if new to our practice*

General Tax Deductions

- Work Related Uniform and Laundry Expenses
- Prior Year Tax Agent Fee - if not prepared by our practice
- Sun Protection - Hats, Sunscreen (Outdoor Occupations)
- Tools & Equipment
- Union Fees
- Income Protection Insurance
- Seminar and Training Fees
- Memberships & Subscriptions
- Telephone, Mobile Phone & Internet
- Interest on Investment Loans (Statements Require)
- Work Related Vehicle Expenses (Substantiation Required)
- Work Related Travel Expenses
- Donation Receipts
- Work Related Self Education Expenses

Rental Property

- Rental Income – Real Estate Agents Statements
- Council Rates
- Water Charges
- Loan Statements for Purchase of Investment Property
- Insurance
- Borrowing Expenses
- Pest Control
- Repairs & Maintenance
- Body Corporate Fees
- Gardening and Lawn Mowing
- Capital Improvements
- Sold investment property - Purchase & Sale Records
- Quantity Surveyor Report
- Travel for Inspections

To ensure that your tax refund is not denied or substantially reduced by the ATO, we strongly recommend that you give attention to the documentation requirements concerning the claims that you are likely to make in the income year.

Liability limited by a scheme approved under Professional Standards Legislation.

Principal: Susan Smith

PO Box 247 Emerald QLD 4720 | Shop 2 Mackay Arcade 16 Ruby Street Emerald QLD 4720

P 07 49824250 | E tax@susansmith.com.au | www.susansmith.com.au

ABN 33 955 015 618 ACN 142 184 996