



Individual Checklist

Seeing Us for the First Time?

**Save time and have the following handy:
(Making our appointment more effective and personal!)**

- ❖ Prior Year Income Tax Return
- ❖ Current Year Group Certificate
- ❖ Work Related Deductions (or summary thereof) – (ie. mobile costs, dry cleaning costs, internet costs, subscriptions, income protection costs etc)
- ❖ Investment Income Details (Interest/Dividends/Annual Tax Statement/s - Trust Distributions/Investment Property – Annual Tax Statement/s)
- ❖ Investment Income Deduction Details (Marketing/Research/Bank Fees/ Loan Details)
- ❖ Other Income (from any other source)
- ❖ Other Deductions (against any other source)

- ❖ Medical Expenses (or summary thereof)
- ❖ Private Health Insurance Statement

- ❖ Donations

- ❖ Motor Vehicle Expenses Details (Registration/Repairs & Maintenance Costs/Petrol & Current Logbook)

- ❖ Got an item (whether income or expense) your unsure of? Bring it along for us to check. Better apply a legitimate deduction than loose it!

READY?

**CONTACT US ON 9880 7892, OR VIA OUR WEBSITE
TO MAKE AN APPOINTMENT**



**Missing some of the above? No problem! Ask us if we can help.
Thanks to access to the Tax Agent Portal and other valid websites
– we may be able to trace some of the above for you.**