



Tax Checklist

INCOME

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

OTHER INCOME

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

DEDUCTIONS (Work related expenses)

- Motor vehicle
- Travel (fares and accommodation)
- Uniforms/work-wear
- Self-education and professional development
- Union, registrations, tools, subscriptions, memberships
- Home office, seminars, conferences
- Telephone, computer, internet
- Any other costs incurred earning income
- Donations to charities or building funds
- Income protection insurance

OFFSETS AND REFUNDS

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

Liability limited by a scheme approved under Professional Standards Legislation.