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INDIVIDUAL TAX RETURN CHECKLIST

INFORMATION REQUIRED FOR COMPLETING TAX RETURNS
Make sure you bring with you all the information needed for completing your tax return. This includes the following:

- PAYG Payment Summaries for wages, pensions and termination payments (ETPs);
- Interest received from savings & investments;
- Dividend statements (showing **dates paid** between 1st July and 30th June of the year being completed);
- Yearly summaries from other investments (e.g. managed fund annual tax statements)
- Details of investments (shares, real estate etc.) sold/purchased during the year (both sale/proceeds amounts received and original costs). This may also include share takeovers and restructures. *Note: the **contract date** is the relevant date for capital gains tax purposes (not the settlement date);*
- Details of work related expenditure;
- Private health insurance information (summary);
- Medical Rebate documents – Net costs ONLY if for disability aids, attendant care or aged care;
- Rental property information (**see additional rental information required**);
- The taxable income of your spouse / de facto, as well as the amount of any taxable and exempt government pensions, Reportable Fringe Benefit Amounts and Reportable Employer Superannuation Contributions, if we do not complete their tax return.

***Please note that the list is a summary only and other information may be required.**

If you are not sure of what to bring along regarding your tax affairs please do not hesitate to contact our office.

**** Please note that other checklists are available on request or from our website. These include a 'Rental Schedule Checklist', 'Financial Account Preparation Checklist' and 'Superannuation Fund Account Preparation Checklist'.**