

Tax Time Checklist

INDIVIDUALS

SALARY & WAGE EARNERS

REQUIRED DOCUMENTS

In order to accurately prepare your tax return it is necessary to have all supporting documentation available at your appointment, such as income statements and proof of purchases (receipts or invoices). Here's a list of some of the things you may need to have ready!

income

Income Statements - Are you tax ready?

- Employer Lump Sum/Termination Payments
- Centrelink Payments
- Job Seeker/Job Keeper Payments
- Government Pensions
- Investment Income Records
 - Interest received on your bank account(s)
 - Dividends received on shares
- Foreign Income
- Rental Investment Income
 - Refer to Taxwise Rental Property Preparation
- Other Income
- Private Health Insurance Statement

expenses

- Motor Vehicle Expenses
 - Fuel
 - Registrations & Insurances
 - Repairs & Maintenance
 - Interest on Loan (*if applicable*)
- Travel Expenses
- Uniform/Protective Clothing/Sun Protection Costs
- Self-Education/HELP/HECS/SFSS - *courses must be directly related to your current work activities*
- Computer Costs
- Home Office
- Internet /Phone (*if prepaid, all receipts are required*)
- Stationery
- Tools & Equipment
- Union Fees
- Donations
- Tax Agent and Accounting Fees
- Income Protection (*not included if paid by Super Fund*)
- Child Support Payments
- Super Contributions - *Have you applied for your Letter of Intent?*
- ALL other items you may consider to be necessary that are directly related to your current work activities

Any Questions?
Call us on (08) 9248 8124

