



INCOME

- Payment summaries
- Lump sum & terminations payment summaries
- Government payment statements, if received
- Interest income from banks & building societies
- Dividend statements for dividends received or reinvested
- Annual tax statements from managed funds

OTHER INCOME

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

DEDUCTIONS

WORK RELATED EXPENSES

- Motor vehicle
- Travel (i.e fares and accommodation)
- Uniforms / work-wear
- Self-education & professional development
- Union, registrations, tools, subscriptions, memberships
- Home office, seminars, conferences
- Telephone, computer, internet
- Tax agent fees from previous year
- Any other costs incurred earning income

OTHER EXPENSES

- Donations to charities or building funds
- Income protection insurance

OFFSETS & REFUNDS

- Health insurance and rebate entitlement statement
- IAS statements or details of PAYG instalments paid
- Spouse details including taxable and exempt income
- Zone offset (location and how many days)

BANK ACCOUNT DETAILS: Please bring your bank account details to your appointment (BSB, Account No)