

INDIVIDUAL TAX CHECKLIST

- Copy of prior year tax return (if not prepared by us)
- PAYG Payment Summary/Group Certificate
- Dividend Statements
- Details of any share sales or purchases
- Tax Statements from Managed Funds
- Rental property information including:
 - Annual rental statement
 - Insurance
 - Rates
 - Interest
 - Depreciation
- Gifts or Donations receipts
- Details of interest earned on bank accounts
- Phone, Electricity, Internet expenses
- Car Expenses
- Number of hours worked from home
- Accounting Fees paid in 2018/19
- Private Health Insurance Tax Statement
- Income Protection Insurance details
- Any Other Deductions
- Spouse's Taxable income and DOB (if we do not prepare their return)