



## Tax return essentials checklist for individuals

### Income

- PAYG Payment Summaries
- Bank interest on all accounts including Term Deposits
- Government Payments (i.e. Newstart, Age Pension) (Excluding family tax payments)
- Other investment income (i.e. Dividends, Rental Properties)

### Deductions

- Occupation specific claims can be viewed here:
  - o <https://www.ato.gov.au/Individuals/Income-and-deductions/Deductions-you-can-claim/Other-deductions/Deductions-for-specific-industries-and-occupations/>
- Donations
- Income Protection Premiums

### Other

- Private Health Insurance Statements detailing premiums paid
- Purchase and Sale details of any investments sold during the year
- Total child support payments made during the year
- Spouse name and annual taxable income

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## Personal Details to be completed before your appointment

Full Name: \_\_\_\_\_  
TFN: \_\_\_\_\_  
DOB: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Residential & Postal Address: \_\_\_\_\_  
Email: \_\_\_\_\_  
Occupation: \_\_\_\_\_  
Number of dependent children: \_\_\_\_\_

Bank Details: (for refund)

BSB: \_\_\_\_\_  
Account Number: \_\_\_\_\_  
Account name: \_\_\_\_\_

Do you wish to participate in our Audit Assurance Service for an additional \$55?

- Yes
- No