



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

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