

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:
<https://www.ato.gov.au/Individuals/Income-and-deductions/Deductions-you-can-claim/Otherdeductions/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 and Postal Address	
Email	
Occupation	
Number of dependents	
Bank Details	Account Name:
	BSB:
	Account Number: