



TAX RETURN CHECKLIST

INCOME

PAYG Summaries are now available to us directly from the ATO.

- Shares & managed funds
- Rental property income
- Business income
- Insurance payouts
- Foreign income
- Bank interest
- Centrelink Payments
- Shared dividend statements
- Managed fund income statements
- Capital gains (sale of property, shares, cryptocurrency)

OFFSETS

- Private Health Insurance Rebate
- Contributions to Super
- Spouse / Invalid Rebates
- Planning

DEDUCTIONS

- Work-related travel:
 - *KM's travelled / logbook*
- Work-related clothing:
 - *Protective clothing, sunglasses, laundry*
- Self-education expenses
- Donations, union fees, phone costs (% work use)
- Tools and equipment
- Income protection insurance
- Registration or licences required for work
- Interest and dividend deductions
- Tax preparation fees
- Rental property expenses

Reminder to provide your bank details to receive your refund.

Call **5444 1022** to secure an appointment or to discuss any of your tax related queries.