

Individual Tax Return Checklist

To assist with the completion of your Tax Return for the year ended 30 June 20____ please find below a list of items we will require.

Completeness of the information requested will greatly assist in the progress of our services.

Name: _____

Date: _____

- Bank account details if they have changed since the previous year;
- Interest, dividend and managed fund income details;
- Purchase and sale documents of assets (including shares, property, managed funds);
- Rental property income and expense details (and receipts);
- Superannuation contribution acknowledgement from Super Fund;
- Copies of receipts for work-related expenses, including union fees, donations, uniform, motor vehicle, working from home and income protection insurance;
- Any other information which you believe may be relevant in assisting us to prepare your tax return.

To assist with keeping our database up to date, please confirm the following:

Address: _____

Mobile number: _____

Home number: _____

Work number: _____

Email address: _____