

Please save this checklist locally before you begin

NAME:

ADDRESS:

PHONE:

EMAIL:

Please find below a list of information we require in order to complete your income tax return:

Information Required	Information Provided	Not Applicable
• A copy of your income statement(s) from your employer(s)	<input type="checkbox"/>	<input type="checkbox"/>
• Details of any interest income received	<input type="checkbox"/>	<input type="checkbox"/>
• Details of any dividends or distributions received (including tax statements and dividend summaries)	<input type="checkbox"/>	<input type="checkbox"/>
• Details of any sales/redemptions of shares or units (including initial cost and sale amount)	<input type="checkbox"/>	<input type="checkbox"/>
• Details of any investment property income and expenses: - Refer to Rental Property Checklist	<input type="checkbox"/>	<input type="checkbox"/>
• Details of any cryptocurrency traded or sold during the financial year	<input type="checkbox"/>	<input type="checkbox"/>

Information Required	Information Provided	Not Applicable
<ul style="list-style-type: none"> • Details of the sale of any property (excluding your main residence) or the sale of any other business or investment asset (including the original cost) 	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> • Copy of Private Health Insurance annual statement 	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> • Details of any work related expenses including: <ul style="list-style-type: none"> - Did you have any work-related training or education expenses? If so, how much did you pay? _____ - Did you have any work-related travel costs (accommodation/flights etc)? If so, how much did you pay? _____ - Did you purchase any uniforms or protective equipment during the year? If so, how much did you pay? _____ - Did you have any income protection insurance? If so, how much did you pay? _____ - What % of your mobile phone would have been work-related and how much do you pay per month? _____ - What % of your internet would have been work-related and how much do you pay per month? _____ - If you have a dedicated home office, how many hours would you have spent working in it? _____ - Details of any other work-related expenses _____ _____ 	<input type="checkbox"/>	<input type="checkbox"/>



Information Required	Information Provided	Not Applicable
<ul style="list-style-type: none"> • How many kilometres did you travel for work purposes (not including from work to home and home to work)? 	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> • Interest paid associated with borrowing to acquire any investments 	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> • Details of any income or expenses from business activities or other sources 	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> • Please advise the number of dependent children (if any) and any Child Support paid 	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> • Details of any donations made to deductible gift recipient charities 	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> • Did you make any additional contributions (not including any amounts paid by your employer) to superannuation? If so, please provide a copy of your notice of intent to claim form. If you have not complete a notice of intent to claim please provide the following information: <ul style="list-style-type: none"> - The name of the superfund _____ - The ABN of the superfund _____ - Your member number _____ - The amount of additional contributions _____ 	<input type="checkbox"/>	<input type="checkbox"/>



Information Required	Information Provided	Not Applicable
<ul style="list-style-type: none"> If we do not complete your spouse's tax return, please provide us with details of their taxable income for the year 	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> If we did not complete your prior year tax return, please provide us with a copy of last year's tax return 	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> Any other information relevant for the current financial year <hr/> <hr/> <hr/> <hr/>		

Contact us

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