|  |  |  |
| --- | --- | --- |
| A picture containing shirt, drawing  Description automatically generatedBasic Tax Return Checklist A Checklist of Information / Documents to bring with you for your appointment | | |
| Income | | |
| 🞎 Income Statement | 🞎 Rental Property Income & Expenses / documents | |
| 🞎 Bank Interest Received | 🞎 Business Income | |
| 🞎 Dividend Income Statements | 🞎 Other Income | |
| 🞎 | 🞎 | |
| Work Related Deductions | | |
| 🞎 Work related car expenses | 🞎 Other work-related expenses | |
| 🞎 Work related travel expenses | | 🞎 Home office hours diary, tools, stationery, telephone/mobile (4 week diary claim), union fees, memberships or subscriptions, |
| 🞎 Uniforms | 🞎 Costs of managing your tax affairs (e.g., last year accountant fees) | |
| 🞎 Work related self-education | 🞎 Income Protection if outside super only | |
| 🞎 Donations | 🞎 | |
| 🞎 | 🞎 | |
| Other | | |
| 🞎 Private Health Insurance Statements | 🞎 | |
| 🞎 Sale of Shares or Investment Property Information / Documents | 🞎 | |
| Notes: | | |