

## TAX CHECKLIST - COMPLEX GENERAL

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|--|---|--|
| <input type="checkbox"/> Tax agent fees                                    | <input type="checkbox"/> Credit card statement  | <input type="checkbox"/> Private health insurance statement          |
| <input type="checkbox"/> Superannuation if self employed                   | <input type="checkbox"/> Bank account name, number and BSB                                | <input type="checkbox"/> Dependants information                      |
| <input type="checkbox"/> Receipts of gifts/donations to charity            | <input type="checkbox"/> Loan statements  | <input type="checkbox"/> Zone details – if you live in a remote area |
| <input type="checkbox"/> Financing lease statements                        | <input type="checkbox"/> Last year's tax return   | <input type="checkbox"/> Sole parent/housekeeper/low income          |
| <input type="checkbox"/> Income protection premiums                        | <input type="checkbox"/> Prior year tax losses  | <input type="checkbox"/> Spouse details (income, DOB etc.)           |
| <input type="checkbox"/> Amount of Family Tax Benefit received fortnightly | <input type="checkbox"/> Details of any government debts (child support, Centrelink etc.) | <input type="checkbox"/> Superannuation pension rebates              |
| <input type="checkbox"/> Tax credit vouchers                               |   | <input type="checkbox"/> Imputation credit information               |

### Income

- Income statements
- Foreign sourced income
- Partnership distribution
- Rental income
- Deductible amount for pension/annuities
- Capital Gains Tax statements (details of any assets sold)
- Lump sum payments eg: Eligible Termination
- Social security, pensions, allowance statements
- Trust distribution statements
- Tax statements from fund managers
- Bank statements - showing interest and fees
- Share dividend statements
- Contract notes for buy/sell transactions
- Tax statements from stockbrokers
- Income stream statements
- Statement for income received from life insurance payments
- Receipts or evidence of work related deductions eg: tools, car, home office, travel, laundry
- Receipts for self-education expenses eg: fees, books, computer costs
- Union fees
- Car finance lease statements

### Investment Related Deductions

- Body corporate fees
- Cleaning
- Capital allowance (depreciation on plant)
- Interest on loans
- Legal fees
- Property agent fees/commission
- Stationery, telephone, postage
- Sundry rental costs
- Advertising costs
- Borrowing expenses
- Council rates
- Gardening/lawn mowing
- Insurance
- Land tax
- Pest control
- Repairs and maintenance
- Capital works deductions (Building write off)
- Travel expenses
- Water charges
- Quantity surveyor's depreciation report - if available
- Interest/fees on borrowing for investment purposes
- Asset purchase/sale agreements

