



## INDIVIDUAL TAX RETURNS

### A HELPING HAND TO ORGANISE YOUR TAX PAPERWORK

*Please tick off the checklist and bring along with your paperwork.*

NAME \_\_\_\_\_

RING (02) **46481628** FOR

ADDRESS \_\_\_\_\_

**APPOINTMENT DAY AND TIME**

EMAIL \_\_\_\_\_

DATE \_\_\_\_\_ TIME \_\_\_\_\_

MOBILE \_\_\_\_\_

**\*NOTE \* IF YOU ARE NEW TO AAM AND HAVE A COPY OF LAST YEARS RETURN PLEASE BRING ALONG AS IT MAY CONTAIN IMPORTANT INFORMATION**

#### **INCOME**

- Income Statement confirmed as Finalised with the ATO
- ACIRT/LSL BOARD Withdrawals
- Superannuation Lump Sum Payments
- Bank Interest Received
- Dividends received
- Employee Share Scheme
- Managed Fund Annual Tax Statements
- Foreign Income Received

#### **CAPITAL GAINS TAX**

- Disposal of Rental Property or holiday home? Need Settlement Statements for Purchase and Sale.
- Disposal of Crypto CGT report (from Koinly)
- Disposal of Shares or Managed Fund Investments?

#### **OTHER INFORMATION TO BRING**

- Partners Details – Name , Taxable Income and Date of Birth
- Child Support Amounts Paid
- Personal Superannuation - Intent to Claim a Deduction claim form or Super Fund Confirmation Letter
- **License Details for personal ID**

#### **RENTAL PROPERTY DETAILS**

- Agent Statements or Income Collected
- Advertising
- Cleaning or Rubbish Removal
- Council Rates
- Gardening Expenses
- Loan Statements and Interest Paid
- Land Tax
- Insurance
- Management Fees
- Pest Control
- Quantity Surveyor Report
- Repairs & Maintenance
- Strata Fees Paid
- Water Rates

#### **DEDUCTIONS**

- Car Expenses including Log Book or Kims travelled
- Other Travel – Train etc
- Work Uniform – Logo'd Uniform Purchases & Laundry
- Protective Wear Purchases
- Work Related Self Education Costs
- Seminar Expenses
- Other Expenses (eg: Union fees, Mobile Ph Internet, Stationary or Tools)
- Home office (Diary /Hours)
- Computer Expenses (eg Ink, Paper & Repairs)
- Accounting Fees paid
- Income Protection Insurance
- Subscriptions
- Donations
- Investment Deductions (eg Interest or Charges)
- Asset Receipts for Depreciation Assets Claimable

**SHOP 7/2-4 MAIN STREET  
MOUNT ANNAN**