



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 _____

Bank Details for any Refund or ATO interest payment

***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

- Notified that Employment Income is 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

RENTAL PROPERTY DETAILS

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

DEDUCTIONS

- Car Expenses including 12 Week Logbook & expense paid (rego, Ins etc or Kms 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 (Full Year WFH Diary)
- 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

CAPITAL GAINS TAX

- Disposal of Rental Property or holiday home? (Need Settlement Statement for Purchase and Sale)
- Disposal/Trading of Crypto Koinly CGT Report
- Disposal of Shares or Managed Fund Investments? Need Buy & Sell

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**

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