

## Taxwise Basic Tax Returns Checklist

Please collect your receipts, tax invoices and documents for the items below – check them off when you’ve found them – this will make your tax return appointment faster and easier.

### GENERAL

- Last Year’s Income Tax Return
- Records of sales and purchases of any shares, business or property
- Private Health Insurance Details
- Spouse Details
- Children’s details including D.O.B and evidence of any Centrelink benefits

### INCOME

- PAYG Summaries
- Pensions or Government payments/Allowances
- Interest earned for the relevant year from the banks, building societies etc.
- Dividend Statements
- Details of rental property income
- Details of any business income
- Details of any other income earned

### EXPENSES

- Work Related Expenses For example: uniform, tools, education, fees etc.
- Motor Vehicle Expenses Incl. estimation of Kilometres if no logbook kept, otherwise logbook and all expense items
- Travel Expenses
- Investment Expenses For example: bank fees, financial advisors fees, investment borrowings etc.
- Rental Property Expenses For example: rates, body corp fees, agent fees, interest on loan, repairs and maintenance (inside and out), travel, water rates, depreciation schedule, etc.)
- Cost of managing tax affairs
- Donations to Charities

If you have issues with any of the items – your Etax Accountant will answer any questions you have.

### Taxwise Australia

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