



## ACCOUNTING & BUSINESS SERVICES PTY LTD

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# Individual Taxation Return Checklist

**Income** – please bring the following documents with you

- PAYE summaries – group certificates
- Government pensions or allowances
- Superannuation or Annuities
- Interest earned – bank statements or passbooks
- Dividend statements – eg IAG shares
- Income from Trusts or Investments
- Rental Income – see Rental Properties worksheets
- Any other income – eg Insurance payouts, jury duty etc
- Spouses Taxable Income – wages, interest, dividends etc

**Deductions** – please bring information with you to prove the following

- Motor Vehicle Expenses
- Work related travel
- Work clothing
- Self education expenses – eg seminars, conferences etc
- Work related expenses – eg tools, phone, union etc
- Investment deductions
- Gifts and Donations
- Other deductions – eg Sickness & Accident Insurance

## Offsets / Rebates

- Private Health Fund Statement – one for each working adult
- Medical Expenses
- HECS debt
- Education expenses on equipment and books etc

## Other

- Bank Account Details – to lodge your return

These are suggestions of some of the items that may be included in your return – if you have any questions please ask either when making your appointment or during the consultation.