

What to bring to your tax return appointment

Income

- PAYG Summaries from employers
- Bank statements for any interest received during the financial year
- Distributions from trusts, partnership, managed super funds
- Allowances (car, travel, entertainment, meals etc.)
- Government pensions and allowances
- Capital gains – e.g. sale of shares or property
- Foreign income
- Dividends
- Personal services income
- Net income/loss from business
- Rental income – e.g. from investment property
- Lump sum termination payments
- Superannuation lump sum payments
- Any shares / options received under an employee share plan

Expenses for tax deductions

- Motor Vehicle expenses based on business use percentage and kilometres travelled (include your log book if applicable)
- Travel and accommodation information – domestic and overseas
- Work uniforms and other clothing expenses
- Courses, education and seminars
- Home office expenses
- Computer, software and repairs
- Tools and equipment
- Employee costs
- Superannuation contributions
- Rent/Lease payments
- Interest paid – on investment property
- Dividend deductions
- Bank Fees
- Low value pool deductions / depreciation
- Telephone and internet costs
- Freight and transport costs
- Utilities – electricity, gas, water
- Legal and accounting fees
- Donations
- Income protection insurance
- Details of any asset purchases
- Childcare expenses

If you're a business

- Bank and credit card statements
- Lease, hire purchase, chattel mortgage or other loan agreements to your business
- Business Activity Statements and Instalment Activity Statements and working papers
- Post – June stocktake valuation figure