

Individual Tax Document Checklist

Do you need to bring any of the following?

- PAYG Payment Summaries from your employer/s
- Passbook or statement from your bank
- Dividend statements regarding your investments showing unfranked, franked and imputation credit
- Details of rental income earned and expenses relating to property
- HECS Statement from the Australian Taxation Office
- Spouse name, D.O.B, Tax File Number and separate net income
- Dependant Names, D.O.B, Separate Net Income
- Receipts, invoices, diary entries/log book or odometer records for your vehicle
- Travel receipts and/or diary
- Receipts or diary records of your laundry/uniform expenses
- Receipts or diary records of your self-education expenses
- Any receipts or notes regarding other work related expenses
- Receipts of donations
- Receipts of expenses of managing last year tax affairs
- Superannuation Statements
- Government Allowance Statement or Payment Summary
- Non-Government Pension statement or payment summary
- Details of foreign income, tax paid and expenses incurred
- Statement from Health insurer
- Detail of medical expenses/refunds received
- Details of your distributions from a managed trust or partnership
- ETP Payment Summary
- Details of asset/s acquired/sold and expenses incurred
- Details of other income received
- Your Income and Expense records for your business

If you have any doubt about any income or expenses you've received or incurred, bring the documents in with you.