

What you need to bring in for the preparation of your Tax Return

For your Individual Non Business Tax Return

Information that should now be mostly electronic (accessible by us and on myGov) :-

- ☐ Income Statement/s (STP should be finalised prior to making appointment or sending in information)
- ☐ Pension statement/s
- ☐ Australian annuities and/or superannuation stream income
- ☐ Interest income received
- ☐ Dividend statements from shares

Information you will need to provide:-

- ☐ Final Payslip for year
- ☐ Managed investments – ‘Annual Tax Statements’
- ☐ Allowances break down, i.e. travel, overtime meals (taxed or untaxed)
- ☐ Details of employee share schemes
- ☐ Work related motor vehicle kilometres & expenses (if log book kept)
- ☐ Work related travel expenses
- ☐ Costs of maintaining and/or replacing uniforms and/or protective clothing
Please Note: Ordinary clothes such as jeans, drill shirts and shorts, trousers and socks that lack protective qualities designed for the risks of your work are **NOT** protective clothing and cannot be claimed as a deduction.
- ☐ Details of work related self-education expenses, i.e. textbooks, stationery, student union fees, course fees, public transport, motor vehicle expenses, computers and internet, where any of these expenses are used for self-education purposes.
Please Note: You may need your employer to confirm that this education is required for your continued employment. Courses funded through HELP, including HECS-HELP, are not tax deductible and cannot be claimed.
- ☐ Telephone/Internet Use – Substantiation of calculation required.
- ☐ Tools and/or Equipment purchases, including date purchased.
- ☐ Home office expenses i.e. costs and total hours (ensure you have kept a diary or a log)
- ☐ Other work related expenses including union fees, subscriptions etc.

- ☐ Donations to registered charities
Please Note: Purchase of raffle tickets or goods from a charity are **NOT** donations
- ☐ Income protection premiums
- ☐ Cost of preparing your previous tax return/s (if we did not prepare)
- ☐ Details of Superannuation Contributions you have made (if any) on behalf of yourself and your partner. In order to claim a tax deduction, you must have supplied a 'notice of intent' and received the letter of acknowledgement back from your superannuation fund. We need a copy of this acknowledgment.
- ☐ If any Assets (other than your primary residence or private car) were sold during the year, please provide the purchase and disposal information to enable us to calculate any Capital Gain or Capital Loss you may have incurred. Please advise whether the asset was owned by yourself, or jointly with another party.

We also require the following information where applicable:-

- ☐ Total reportable fringe benefits amount/s
- ☐ Reportable employer superannuation contributions (amounts above the 9.5% Superannuation Guarantee and also including Salary Sacrificed Superannuation)
- ☐ Tax-free government pensions
- ☐ Target foreign income
- ☐ Net financial investments loss/es
- ☐ Net Rental property loss/es
- ☐ Child support paid

TERMS OF BUSINESS

The following payment methods are offered for your convenience:

- EFTPOS
- Credit Card (This will incur an additional 3% charge)
- Cash
- Cheque

As a last resort, a trust authority (fee from refund) can be used; however will incur an additional \$25 charge.

Please ensure that the relevant information is provided 14 days prior to your appointment. If you are unable within this time frame, please contact the office to possibly change your appointment time.

***** NOTE** If you own a Rental Property, or are self-employed in business, you will also have to provide us with that relevant information. If you require clarification of what is required, please do not hesitate to contact us.***