

Tax Documentation Checklist

What to bring to your meeting

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Income	
PAYG Payment Summaries (Group Certificates) including any termination payments if applicable	<input type="checkbox"/>
Any interest earned from bank accounts	<input type="checkbox"/>
Last year's tax return	<input type="checkbox"/>
Statement of assets and liabilities	<input type="checkbox"/>
Other income including rental properties, dividends etc	<input type="checkbox"/>
Deductions and Expenses	
Work related expenses	<input type="checkbox"/>
Donation receipts	<input type="checkbox"/>
Interest on investment loans	<input type="checkbox"/>
Insurance policies eg income protection, TPD, life insurance	<input type="checkbox"/>
Health insurance annual statement	<input type="checkbox"/>
Out of pocket medical expenses	<input type="checkbox"/>
Superannuation annual statement	<input type="checkbox"/>
Spouse details including income	<input type="checkbox"/>