

What to bring in, come tax time

Individuals

Income

	Attached	Not Applicable
PAYG payment summaries	<input type="checkbox"/>	<input type="checkbox"/>
Lump sum payments	<input type="checkbox"/>	<input type="checkbox"/>
Interest earned from bank accounts including term deposits	<input type="checkbox"/>	<input type="checkbox"/>
Dividend statements	<input type="checkbox"/>	<input type="checkbox"/>
Rental Property Income	<input type="checkbox"/>	<input type="checkbox"/>
Partnership distribution statement, and a copy of partnership's tax return	<input type="checkbox"/>	<input type="checkbox"/>
Trust distribution statement, and a copy of trust's tax return	<input type="checkbox"/>	<input type="checkbox"/>
Documentation regarding foreign source income, foreign assets or property	<input type="checkbox"/>	<input type="checkbox"/>
Employee share scheme statements	<input type="checkbox"/>	<input type="checkbox"/>
Managed fund annual tax statement and capital gains tax statement	<input type="checkbox"/>	<input type="checkbox"/>
Sell contract notes for any shares sold, include purchase costs as well	<input type="checkbox"/>	<input type="checkbox"/>
Any other income	<input type="checkbox"/>	<input type="checkbox"/>

Work-related Deductions

Details of depreciable assets bought during the year (eg laptops)	<input type="checkbox"/>	<input type="checkbox"/>
Details and receipts for home office expenses	<input type="checkbox"/>	<input type="checkbox"/>
Professional journals/trade magazines	<input type="checkbox"/>	<input type="checkbox"/>
Professional memberships/subscriptions	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for continuing professional development courses and seminars	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for self-education expenses	<input type="checkbox"/>	<input type="checkbox"/>
Receipts for other work-related deductions such as protective clothing, uniform expenses, tools and equipment, and travel	<input type="checkbox"/>	<input type="checkbox"/>
Vehicle logbook for motor vehicle expenses (if using the logbook method)	<input type="checkbox"/>	<input type="checkbox"/>
Details for telephone & internet costs incl. Business use percentage.	<input type="checkbox"/>	<input type="checkbox"/>

Other Deductions

Receipts for donations of \$2 and over to registered charities	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in managing tax affairs	<input type="checkbox"/>	<input type="checkbox"/>
Expenditure incurred in earning interest, dividend and other investment income (eg investment advice fees)	<input type="checkbox"/>	<input type="checkbox"/>
Income protection insurance premiums	<input type="checkbox"/>	<input type="checkbox"/>
Any personal superannuation contributions	<input type="checkbox"/>	<input type="checkbox"/>

Rental Properties

	Attached	Not Applicable
Date when property was purchased, including details of co-ownership if applicable	<input type="checkbox"/>	<input type="checkbox"/>
Records detailing rental income (annual statement from property agent, if engaging services of an agent)	<input type="checkbox"/>	<input type="checkbox"/>
Loan statements for property showing interest paid for the income year	<input type="checkbox"/>	<input type="checkbox"/>
Expenses incurred such as water charges, land tax and insurance premiums	<input type="checkbox"/>	<input type="checkbox"/>
Details of depreciable assets bought or disposed of during the year	<input type="checkbox"/>	<input type="checkbox"/>
Details of any capital works on the property	<input type="checkbox"/>	<input type="checkbox"/>
If the property was disposed of during the income year, information relating to dates and costs associated with the disposal of the property	<input type="checkbox"/>	<input type="checkbox"/>

Offsets/Rebates

Details of any superannuation contributions for spouse	<input type="checkbox"/>	<input type="checkbox"/>
Details of dependants, including their age, occupation and income	<input type="checkbox"/>	<input type="checkbox"/>
Private health insurance statement (and details of prepaid premiums)	<input type="checkbox"/>	<input type="checkbox"/>

If Operating As a Sole Trader

Backup of accounting software or access to online files granted.	<input type="checkbox"/>	<input type="checkbox"/>
Copies of PAYG summaries for employees	<input type="checkbox"/>	<input type="checkbox"/>
Details of any government grants, rebates or payments received	<input type="checkbox"/>	<input type="checkbox"/>
Details of superannuation contributions for employees	<input type="checkbox"/>	<input type="checkbox"/>
Details of any assets purchased, including date of purchase and amount	<input type="checkbox"/>	<input type="checkbox"/>
Payments of salaries and superannuation to associates	<input type="checkbox"/>	<input type="checkbox"/>
Notice of superannuation contributions for self-employed persons	<input type="checkbox"/>	<input type="checkbox"/>

Other

Any other information that you think is relevant	<input type="checkbox"/>	<input type="checkbox"/>
Prior year's tax return (if not completed by STM)	<input type="checkbox"/>	<input type="checkbox"/>
Bank Account Details for any refunds	<input type="checkbox"/>	<input type="checkbox"/>