

DOCUMENTS REQUIRED FOR PREPARING INDIVIDUAL TAX RETURNS

Documents required may include but are not limited to:

A copy of your last lodged Tax Return

Personal information:

Bank Details in case a refund is due

Private Health Insurance statement (if applicable)

Income

Payment Summaries

Government payment statements (if applicable)

Interest from Bank Accounts

Investment income

Any other income

Deductions

Work related expenses

Car expenses including log book (if applicable)

Letter of Intent from your Super Co. (if personal super contribution needs to be claimed as deduction)

Sole Trader (if applicable)

Business income

Itemised Business expenses

Assets purchased during the year

Copy of Depreciation Schedule form Tax Return lodged last

Copy of the last tax return lodged with ATO

Investment Property (if applicable)

Date property got rented

Rental Income

Rental Expenses

Interest expense

Depreciation Schedule

Capital Gains (if applicable)

Asset purchase date and price

Asset sale date and price

Incidental costs towards purchase & Sale