



TAX RETURN CHECKLIST

Here is what you need to bring:

- Personal Details
 - Tax file number
 - Bank details (BSB and Account Number) to receive any refund owed
 - Private Health Insurance Statement

- Income Details
 - PAYG Payment Summaries
 - Statements from banks and financial institutions showing interest received
 - Details of foreign pensions or other foreign income received
 - Employment termination payment summaries

- Expenses Details
 - Receipts for gifts, donations and work-related expenses
 - Details of any child support payments made

- Investment Details
 - Dividend payments and distributions from managed funds
 - Any investment gains or losses from the disposal of shares, units and rental properties

- Rental Properties
 - Rental Income Earned
 - Interest charged on money borrowed for rental property
 - Other expenses in relation to property, including any expenditure on capital works