

All your finances in one place.

Individual Tax Checklist

- We've made it easy to make sure you don't miss out on any deductions this tax time. Just use our handy tax checklist to prepare for your appointment with us.

Income

- Payment Summaries and Income Statements
- Lump Sum and Termination Payment Summaries
- Government payment statements, if received
- Interest income from banks and building societies
- Dividend statements for dividends received or reinvested
- Annual Tax Statements from Managed Funds

Deductions (Work related expenses)

- Motor vehicle expenses (claimable if vehicle is used for work purposes, includes fuel, maintenance, registration, and insurance)
- Travel expenses (including airfares, accommodation, and meals. Must be directly related to earning your income.)
- Uniforms/work-wear (including laundry expenses, and protective gear.)
- Self-education and professional development (courses, seminars, and study materials related to your current job.)
- Union, registration, tools, subscriptions, memberships
- Home office expenses (work-from-home expenses, portion of electricity, internet, and phone bills, depreciation of home office equipment.

Other Deductions

- Communication and Technology (telephone, computer, internet)
- Any other costs incurred earning income
- Donations to charities or building funds
- Income protection insurance
- Health insurance and rebate entitlement statement
- IAS statements or details of PAYG instalment paid
- Spouse details including taxable and exempt income

Personal information updates

- Changes to legal name
- Updates to Bank Account details
- Changes to telephone number
- Changes to residential and/or postal address
- Updates to family information (such as new dependents)

Tax Refunds

Remember to bring your bank account details, including the BSB and account number with you to your appointment. You can also take advantage of our Fee from Refund service, if you receive a refund.