

## Income

- Employer Income Statements if applicable  
*Note it will usually be provided direct to the ATO now as an Income Statement*
- Government Payments, Pensions, Allowances and Benefits including Parental Leave
- Employee Share Scheme PAYG Summary
- Interest Received (Bank Statements)
- Share Dividend Statements
- Managed Funds Annual Tax Statements
- Eligible Termination Payments (ETP)
- Capital Gains Tax Statements
- Partnership & Trust Distributions
- Foreign Income and Tax Withheld
- Rental Income (& Associated Expenses)

## Work Related Deductions

- Home Office Expenses  
(hours worked or actual costs based on usage)
- Union Fees
- Tools, Equipment and Office Furniture  
(including date of purchase for items > \$300)
- Mobile & Internet Costs (work, bus or investment)\*  
\* diary recording use required for claims over \$50
- Uniform/Protective Clothing & Laundry
- Covid Related Protective Gear/RAT Tests for Work
- Reference Materials & Stationery/Computer Exp
- Work Related Self-Education Expenses
- Work Related Travel Expenses
- Motor Vehicle Expenses  
(e.g. set rate per km, costs with log book)

## Investment Related Items

- Asset Sale Documents - eg Shares, Property  
(with related cost and purchase/acquisition docs)
- Education on Investments  
(seminars, courses, share clubs etc)
- Interest / Fees on Investment Borrowings
- Reference Materials
- Computer Based Items - eg Software
- Asset Purchase Agreements

## Other Deductions

- Superannuation Contributions not already claimed
- Gifts/Donations to Charity
- Income Protection Premiums
- Tax Costs & Ongoing Financial Planning Advice

## Other Items to Bring In

- Bank Account Details - for direct refund  
(including BSB, account number and name)
- Spouse Details including Taxable Income and Reportable Amounts on Emp Income Statements
- Details of Dependents
- Private Health Insurance Annual Statement
- HECS / HELP / FEE - HELP Documents
- Child Support Payments
- PAYG Instalment Details
- Prior Year's Tax Returns (if new client)