

Information required to prepare your Income Tax Return

Personal Information – We will already have this if we have prepared your income tax return before

- Tax File Number
- Date of Birth
- Full Name
- Home & Postal Address
- Phone Numbers
- Email
- Occupation
- Bank Account Details (for tax refund to go into)

Income

- Australian annuities and superannuation
- Interest Received
- Dividends Received (including if you have participated in any dividend reinvestment schemes or received bonus shares)
- Details of distribution received from any trusts and/or partnerships
- Annual Tax Statements from any managed investment trust / funds
- Shares or other assets acquired or sold
- Income protection payments received
- Details of foreign employment, pensions, interest, dividends or distributions
- Business income
- Crypto Currency Capital Gains / Losses
- Any other income received

Deductions

- Work related motor vehicle expenses
 - Estimated kilometres travelled.
 - If above 5000kms, full details of fuel, repairs & maintenance, registration and insurance for each vehicle used related to work
 - Log Book
- Work related travel expenses
 - Accommodation, meals, airfares, taxi fares and purpose of trip
- Uniforms, protective clothing and laundry expenses
- Work related self education expenses
- Other work related expenses
 - Union Fees
 - Professional memberships
 - Tools & equipment
 - Home office expenses
 - Seminars, conferences & training courses
- Gifts or donations \$2 and over
- Accident or sickness insurance premiums
- Personal super contributions that you wish to claim a tax deduction for