



Tax Return Information Checklist

➤ **Personal Details**

Name, Address, Previous Address if different from current year, D.O.B, Phone numbers, email address, Tax File Number, Spouse details, Dependants details.

➤ **Business Details**

Name, Address, ABN (if you have one and any income & expenses relating, any assets you own that you use for the business and the type of work you do as well as how old the business is.)

➤ **Bank Details**

BSB, Account Number, Account Name

➤ **Financial Details**

Any previous tax losses, any investments including shares, interest bearing accounts, rental properties, personal superannuation contributions, any other debts including HECS/HELP or Centre-link debts.

➤ **Receipts for items brought for work purposes**

➤ **Private Health Insurance Statement & Details**

➤ **Medicare number and any unreimbursed medical expense receipts**

➤ **Any Group Certificates from your employers**

➤ **Details of any other income earned during the year or any other PAYG (tax withheld amounts)**

➤ **Details of any Centre-link Payments i.e.: Newstart, Youth Allowance, Family tax etc.**

➤ **Bank Statement & Gross Interest earned in the year**

➤ **Last year's NOTICE OF ASSESSMENT – this would be sent by the tax office to you with the amount of tax return you received/paid and a copy of your last tax return if you have it.**

➤ **ANY OTHER ITEMS OF EXPENSE & INCOME THAT RELATE TO THE OPERATION OF YOUR BUSINESS OR PRODUCING YOUR ASSESSABLE INCOME & LIST ANY ITEMS YOU USE SUCH AS VEHICLES, EQUIPMENT OR COMPUTERS. INCLUDE LOG BOOK FOR VEHICLES IF COMPLETED.**