

TAX CHECKLIST

Use our tax checklist to assist you in preparing the information required for your tax return.
Ensure you keep all receipts; we only require summaries of your deductions.
If required, we will request your source documents.

Income

- ☐ Annual Tax Statements from Managed Funds, provide source documents
- ☐ Government payment statements, if received
- ☐ Interest income from banks and building societies
- ☐ Dividend received or reinvested

Other income

- ☐ Rental properties (including Airbnb, Stayz, etc)
- ☐ Business income
- ☐ Foreign income
- ☐ Capital Gains (including cryptocurrency, provide tax cryptocurrency tax report)
- ☐ Employee share schemes

Deductions (work related expenses)

- ☐ Motor vehicle
- ☐ Travel (fares and accommodation)
- ☐ Uniforms/workwear/dry cleaning
- ☐ Union, registrations, tools, subscriptions, memberships
- ☐ Self-education
- ☐ Professional development, seminars, conferences
- ☐ Record of hours worked from home
- ☐ Any other costs incurred earning income
- ☐ Donations to charities
- ☐ Income protection insurance
- ☐ Personal superannuation contributions (provide notice of intent to claim letter)

Offsets and refunds

- ☐ Health insurance and rebate entitlement statement
- ☐ Spouse details including taxable and exempt income

Any questions?

Don't hesitate to call us on (03) 9848 5933 or email taxinvest@royamcdonald.com