**INDIVIDUAL RETURN CHECKLIST**

The following checklist is a guide to the most common income and deductions in personal tax returns and is designed as a guide of information to bring in for your appointment.

**INCOME:**

 Payment Summaries from Employment

 Centrelink Payment Summaries

 Bank Interest. (Please bring in BSB & ACC numbers for your refund also)

 Dividend Payments from share holdings

 Sale of any Assets

 Any other income received

**EXPENSES**

 Motor Vehicle Expense. – Log book if kept or number of Km for work use

 Parking costs, Tolls and Taxi Fares

 Uniform/Protective Clothing

 Courses or Education Expenses

 Union Fees

 Professional Registration Fees

 Telephone Expenses

 Internet Expenses

 Stationary and Home Office Expenses

 Tools of the trade

 Sun Protection

 Donations To Charity

 Tax Agent Fees from previous year

**OTHER ITEMS**

 Private Health Insurance Details

 Spouse Details including Income

 Child Support Payments Made

If you are unsure if something is relevant please bring it along to the interview and we can discuss it

**To book an appointment call 0425 333 899 or drop into Room 33 Warrnambool Business Centre**

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