



Accountants | Taxation Consultants | Financial Planners

Portal Office Park, 2994 Logan Rd Underwood QLD 4119

Phone: (07) 3341 4658 • Fax: (07) 3341 4695

Web: www.taxsolutions.com.au



PRIVATE AND CONFIDENTIAL

## TAX APPOINTMENT CHECKLIST

Name: \_\_\_\_\_

Financial Year: 30 June 20\_\_

- PAYG Payment Summaries
- Centrelink Pension/Benefit Statements
- Bank Statements - Interest Details
- Dividends from Shares
- Income from Managed Funds/Trusts
- ETP Statements for Termination Payments
- Superannuation Contributions & Policy Number
- Spouse/Partner Taxable Income
- Health Insurance Tax Statement
- Motor Vehicle Logbook/Details
- Work Related Expenditure - Uniforms, Phone, Internet, Stationery, etc
- Gifts & Donations to Charities and/or Political Parties
- School Building Fund Levies
- Education Expenses - Computer, Internet, Stationery, Books, Etc
  
- Others:**
- Rental Property**
- \* Income & Expense Details - Loan Statements, Rates, Insurance, etc
- \* Sale of Property Capital Gains - Purchase & Sale Settlement Sheets
- Business**
- \* Income & Expense Details
- \* Bank Statements & Cheque Books
- \* Accounting software data file

***PLEASE RETAIN YOUR RECORDS FOR 7 YEARS***