

Are your contact details up to date with our firm?  
Our office will supply all correspondence to you via email;  
please make sure we have your current and correct email address.

**Please note: Our office requires you pay prior to lodgment for the preparation of your Individual Income Tax Return.**

## INCOME

- Income Statements/PAYG Payment Summaries.
- Lump sum & termination payments.
- All & any Government Centrelink payments pensions etc.
- Interest earned from bank account / term deposit (s).
- Dividend statement (s).
- Details of any super payments received.
- Salary sacrifice super contributions.
- Income distributions from trusts & partnerships.
- Investment property income.
- Details of any CGT asset sales (e.g. shares & real estate).
- Details of any Cryptocurrency transactions.
- Foreign source (employment & pension) income & details of any foreign tax credits.
- Child support paid/received.
- Business income.

## DEDUCTIONS

- Employment related expenses: motor vehicle, self education, travel, home office, telephone, internet, protective clothing & uniform expenses etc.
- Donations & subscriptions.
- Tax agent's fees & other accounting/tax audit fees.
- Investment property expenses.
- Income protection insurance statement.
- Personal superannuation contributions made. (Please supply Intent to Claim Form)
- Business expenses: motor vehicle, insurance, repairs & maintenance, advertising, tools & materials, etc.

## REBATES

- Private health insurance statement.
- HELP debt & financial supplement.

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