

# TAX TIME CHECKLIST

## INCOME

- PAYG Payment Summaries
- Lump Sum and Termination Payment Summaries
- Interest or Dividend Income Statements
- Capital Gains statements for sale of property or shares
- Annual Tax Statements for Managed Funds
- Statements of any Government Grants or Parental Leave payments
- Rental Property Income and Expenses (Agent Summaries and out of pocket costs)
- Private or Business income
- Foreign income
- Income protection insurance income

## DEDUCTIONS/EXPENSES

- Memberships
- Professional Indemnity
- Subscriptions and Books/Journals
- Telephone and Internet, printing, postage and stationary
- Computer software and Apps
- Conferences and Professional Development (Registration, Flights, Accommodation, Meals, Cabs/Uber, Train/Tram/Bus)
- Gifts or Donations
- Income protection insurance premiums
- New Equipment items (e.g. Tablet, Phone, Laptop)
- Motor Vehicle - logbook or cents per kilometre
- Parking and Tolls
- Home office diary
- Protective clothing and laundry

## OTHER

- Annual Private Health Insurance Statement