

TAX RETURN CHECKLIST - WHAT YOU NEED

- pay as you go payment summaries
- interest earned from bank accounts and term deposits
- dividend statements
- private health insurance statement
- HELP (formerly HECS) statement from the Australian Taxation Office
- receipts, invoices, diary entries, logbook and odometer records for your motor vehicle
- summary and diary records of travel, self-education expenses, laundry expenses
- bank statements
- bookkeeping data file – MYOB, Quicken, Cash Manager, etc.
- business activity statements
- summary of your income and expense records for your business
- details of rental income earned and expenses relating to property
- details of assets acquired/sold and expenses incurred including shares & property
- details of your distribution from a managed trust or partnership
- Australian government allowance statement or payment summary
- your PAYG payment summary from your annuity or superannuation provider
- eligible termination payment statement
- summary of medical expenses/refunds received
- foreign entity distribution statements, foreign tax paid and expenses incurred
- details of other income received