

WHAT WILL YOU NEED TO BRING WITH YOU

So we can make the most of your tax appointment please bring any of the following that you have:

Income

- PAYG Payment Summaries (previously Group Certificates) You should be provided a copy from your employer.
- Payment Summaries from Centrelink for example, Newstart, Youth Allowance, Disability Pension
- Eligible termination payments
- Interest earned from bank accounts
- Share dividend statements
- Annual tax statements from trusts, managed investments, property and cash management trusts
- Income and expenses from rental properties

DEDUCTIONS & EXPENSES

- A list of work-related expenses (with receipts). This includes your motor vehicle log
- Interest and fees on investment loans
- Donations to charities (unless you get a ticket to win something in return, those ones don't count)
- School building levies and library funds
- Fee charged for previous year's tax return
- Income protection insurance
- Sickness and accident insurance
- Private health insurance
- Any extra superannuation contributions
- Amount of HELP debt or Financial Supplement loans outstanding
- Out of pocket medical expenses if you have spent more than \$2,265 on disability aids, attendant care or aged care

OTHER DETAILS

- Bring the details of your spouse, including their date of birth and taxable income to check if you may be eligible for tax benefits.
- The bank account details for where you want your tax refund deposited into
- **Eftpos or cash payment to access the pay on the day discount offer**