

Richard A Bobb Chartered Accountants

What to Bring to Your Tax Appointment

A simple checklist to make your tax return easy

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What to Bring to Your Tax Appointment

■ Personal Information

- 1 Tax File Number (TFN)
- 2 Bank account details for refund
- 3 Spouse's income (if applicable)

■ Income Documents

- 1 PAYG Payment Summaries / Income Statements
- 2 Centrelink or other government payment summaries
- 3 Interest income statements from banks
- 4 Dividend statements from shares/investments
- 5 Rental property income (if any)
- 6 Other income (foreign income, capital gains, etc.)

■ Deduction Records

- 1 Work-related expenses (receipts for uniforms, tools, training, travel)
- 2 Vehicle logbook or mileage records (if claiming car expenses)
- 3 Home office expenses (internet, phone, electricity % used for work)
- 4 Donations to registered charities
- 5 Self-education expenses

■ Other Documents

- 1 Private health insurance details
- 2 Childcare or family benefit information (if relevant)

Bring this checklist with you to save time and maximise your deductions!