



# General

## Income

- PAYG Summaries
- Pensions or government payments/allowances
- Interest earned for the relevant year from your banks, building societies etc.
- Dividend statements
- Details of rental property income
- Details of any business income
- Details of any other income earned

## Notes

## Work and other Expenses

- Personal car expenses (Est of km's if no logbook kept, otherwise logbook and all expense items.)
- Travel expenses (parking, tolls, flights, taxis, train and bus fares for training courses, trade fairs etc.)
- Accommodation costs while working away from home
- Phone costs (for work usage)
- Work percentage of computer/laptop expenses (Lease or purchase)
- Work percentage of internet costs
- Home office running expenses
- Work related self-education expenses
- Last year's tax return fee
- Income protection insurance premiums (paid outside of Superannuation)
- Investment expenses (Eg: bank fees, financial advisor's fees, investment borrowings etc.)
- Donations

## Other Information

- Records of sales and purchases of any shares, business or property
- Private health insurance details
- Spouse details including D.O.B and estimated taxable income
- Children's details including D.O.B and evidence of any Centrelink benefits
- Details of any government debts (Child support, Centrelink ATO debt including previously written off debt)

