



TAX RETURN CHECKLIST

Please bring the following to your appointment (if applicable)

Individuals:

- PAYG Payment Summaries / 'Tax Ready' status received on Income Statements
- Work-related receipts (tools, uniforms, training, etc)
- Income protection insurance
- Donations
- Last year's Tax Agent fees
- Dividend statements
- Sale of any shares (please bring purchase and sale details)
- Managed Investment Fund Tax statements
- Partner/spouse's income
- BSB and Account number for any refunds
- Plus, any other documents you think are necessary

Should you have any questions please do not hesitate to contact us on:

Rockingham	(08) 9528 5863
Bunbury	(08) 9701 9470