



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

Rental Properties

- Rental income
- Insurance
- Interest on loan
- Council rates
- Water rates
- Depreciation schedule
- Repair expenses
- Rental Agent fees
- Strata/Body Corporate fees
- Plus, any other documents you think are necessary

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

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