ORLI HENIG
REGISTERED TAX AGENT & ACCOUNTANT

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41-45 Myora Row, Karalee Qld 4306

INCOME TAX CHECK LIST

To make sure you have everything you need for your appointment we have created a check list for you.

GENERAL

- ☐ Last year's income tax return (new clients only)
- ☐ Details of any purchases or sale of shares/property/business
- ☐ Private health insurance details
- ☐ Spouse's taxable income
- ☐ Children details including D.O.B. and whether you currently receive Centrelink
- ☐ Bank account details (for refunds)

INCOME

- ☐ PAYG payment summaries (group certificates)
- ☐ Pensions or government payments / allowances
- ☐ Interest earned for the relevant year from the banks, building societies etc
- ☐ Dividend statements
- ☐ Details of any rentals property income
- ☐ Details of any business income

EXPENSES

- ☐ Work related expenses (tools/education/uniform/union fees)
- ☐ Motor vehicle expenses (estimate of kilometres if no logbook kept, otherwise logbook and all expense items)
- ☐ Travel expenses
- ☐ Investment expenses (bank fees/financial advisors fees/investment borrowings etc)
- ☐ Rental property expenses (rates/property agents/insurance/interest/repairs/and maintenance etc)
- ☐ Donations
- ☐ Cost of managing tax affairs
- ☐ Income Protection Insurance

Please bring along this information on the day of your appointment.