

Information you need to supply:

Income

- Gross Salary, Wages, Allowances, Benefits, Earnings, Tips and Directors' Fees
- PAYG Payment Summaries (Group Certificates)
- Details of any non-cash benefits received (e.g. employee shares)
- Lump sum and termination payments. All documentation should be provided, including an ETP Payment Summary from the employer or fund
- Details of any CGT asset sales (e.g. shares and real estate). Please include dates of, and costs associated with, purchase and sale
- Annuities, including allocated pensions
- Income from trusts and partnerships. Statements of distributions should be provided where appropriate
- Rental income
- Interest and dividends received and any tax deducted. Includes details of franked dividends (even if reinvesting)
- Foreign source (employment and pension) income and details of any foreign tax credits

Deductions

- Employment related expenditure, such as work-related motor vehicle, self-education, protective clothing, uniform expenses and union fees. (Please ensure you retain evidence of these expenses)
- Investment and property expenses, including interest paid, rates and repairs etc. (If it is a new property the contract and settlement statement from a solicitor will also be required)
- Subscriptions (not including sporting or social clubs)
- Donations to charities of \$2 and over
- Tax Agent Fees and other accounting/tax audit fees. Includes financial planning fees if applicable
- Special deductions (Australian films, investment shelters and agribusiness-type schemes)
- Bank fees (where the credit or deposit represents assessable income)
- Income protection insurance – where fees are paid out of pocket

Other

- Details of private health insurance
- Child support expense or income received
- Contributions to spouse's superannuation fund
- Any changes in dependants (income of spouse should be provided)
- Out of pocket family medical expenses if they exceed \$2,160 in total (including dental, optical and pharmaceutical expenses), only if they were claimed in the 2013 financial year (as this offset is being phased out by the Government)
- Bank details for your tax refund to be deposited
- Spouse details including Salary, Wage, Centrelink income and dependant details.

If we haven't done your tax return before, please supply us with a copy of your last tax return and Notice of Assessment.