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**Frequently Asked Question**

**What do I need to bring to my appointment?**

Clients often ask us what documents they should have in preparation for their tax appointment.

**Here is a check list of key items that you should bring to your appointment:**

 Employment PAYG summaries

* Bank Interest – Online banking should show total financial year in account summary info
* Share Dividends
* Work related expense receipts & logbooks
* Donations
* Income Protection Insurance paid other than through super
* Private Health Insurance Tax Statement
* Child support paid

**Below are more specific examples of what you can bring to your appointment for Individual Income Tax Returns**

**Income**

* Payment summaries for salaries and wages (this can now be viewed on the ATO portal)
* Allowances (e.g. entertainment/car / travel / uniform / laundry / meals)
* Lump sum termination payments Government pensions and allowances
* Payment summaries for superannuation income streams or other pensions
* Payment summaries for superannuation lump sum payments
* Interest (tip: check internet banking) and dividends
* Distributions from partnerships or trusts, including managed funds
* Details of investment assets sold, such as shares or real estate

**Work Related Expenses**

* Use of own motor vehicle for business travel
* Other business travelling expenses (car parking, road tolls, accommodation)
* Purchase of protective and or compulsorily clothing/ uniforms/ safety boots
* Sun protection expenses
* Self-education expenses (related to your current job)
* Home office running expenses
* Telephone expenses
* Depreciation of library, tools, business equipment, percentage of home computer
* Tools of trade
* Subscriptions to trade magazines
* Union membership

**Investment Related Expenses**

* Account keeping fees
* Ongoing management fees
* Interest on borrowing to buy shares
* Advice relating to changing and managing investments (but not setting them up)
* Investment publications (e.g. financial review, magazines, not ordinary newspapers)

**Other Expenses**

* Donations (made to a deductible gift recipient)
* Income Protection Insurance Premiums (not claimable if policy is held in super)

**Rental Properties - Key documents required**

* Rental Summary from agent– or if not using an agent, your record of rent received
* Interest paid (most banks will provide a total online or on your June bank statement)
* Depreciation report from a quantity surveyor
* Repairs and maintenance (itemised list with receipts)

It is important to itemise repairs & maintenance so we can distinguish between amounts that are immediately deductible and amounts that must be written off over time).

* Other expenses include advertising, cleaning, gardening, pest control, council/water rates, insurance, property agent fees, printing, postage and stationery, travel (e.g. to inspect property, visit agent etc.). For car travel, estimate total km.

**Additional information**

* Contact details, if changed from last year
* Bank Account details for your refund (BSB, Account Number and Account Name)
* Remote zone allowance (if you lived in a remote area)
Details of place and number of nights stayed
* Private health cover statement
* Spouse details
Date of birth, taxable income, fringe benefits, reportable super contributions
* ****Any other information that you may consider relevant

**Ready to book an appointment?**

**Contact Culburra Beach Accounting and Tax**