

# Culburra Beach Accounting & Tax

## Documents to bring to your 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

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