



Peregian Accounting Services
Adaptive Accounting Pty Ltd

Unit 3, 12 Grebe Street Peregian Beach
Box 678 Coolumb Beach Q 4573
Telephone **07 5448 1218**
Facsimile 07 5448 1221
E-Mail geoff@adaptive.net.au

ABN

19 181 296 335

What to bring to complete your Individual Tax Return.

When you come in to see us, you will need to bring as much information as possible relating to your specific matter to help us best process your tax. The list below is only a guide for the sorts of documents we usually require, not an exhaustive list. If you have something that isn't on the list that you think may be relevant, please bring it with you.

Please note: "Payment Summaries" are what many taxpayers may know as "Group Certificates"

- ✂ PAYG Payment Summaries
- ✂ Eligible Termination Payment (ETP) Payment Summaries
- ✂ Pensions & ComSuper Payment Summaries
- ✂ Centrelink Payment Summaries
- ✂ Private Health Insurance annual statement
- ✂ Amounts of interest earned >\$1
- ✂ Share dividend statements
- ✂ Trust distribution statements
- ✂ Managed Investment Scheme statements
- ✂ Share & property sales and purchase information if you sold any
- ✂ Rental income & expenses
- ✂ Business income & expense details (see the document "What to bring to complete your business tax return")
- ✂ Foreign income
- ✂ Any other income
- ✂ Travel expenses for work, eg travel fares and accommodation
- ✂ Motor vehicle expenses for work, including kms traveled, rego number, engine size, log book if applicable
- ✂ Dry-cleaning or laundry costs for protective work clothing/uniforms
- ✂ Protective work clothing/uniforms purchase costs
- ✂ Self-education costs
- ✂ Union fees
- ✂ Other work related expenses, including computers, mobiles etc.
- ✂ Donations
- ✂ Costs of preparing last year's tax return
- ✂ Income protection insurance amounts
- ✂ Medical expenses (if your out-of-pocket expenses were more than \$2,000)
- ✂ Spouse's date of birth and income details



IPA INSTITUTE OF PUBLIC
ACCOUNTANTS

- Accounting
- Bookkeeping
- MYOB & QuickBooks Training and Support
- Tax Agents

NOT ALL ACCOUNTANTS ARE THE SAME