

Interview Checklist

The following is a list of information that you may need to bring with you when you have your tax return prepared.

- ✓ PAYG Payment Summaries (Group Certificates)
- ✓ Interest Income
- ✓ Dividend Income
- ✓ Income from Investments / Managed Funds
- ✓ Trust and/or Partnership Distributions
- ✓ Asset Sales
- ✓ Overseas Income
- ✓ Employment Termination Payment Summaries
- ✓ Bonuses from Life Insurance Companies / Friendly Societies
- ✓ Rental income and expenses
- ✓ Business income and expenses
- ✓ Work related car, travel, uniform and self education expenses
- ✓ Other work expenses (eg. union fees, tools, telephone, stationery, sun protection items computers)
- ✓ Donations
- ✓ Tax agent fee from last year
- ✓ Personal Superannuation contributions
- ✓ Private health insurance statement
- ✓ Spouse's details (full name, date of birth, taxable income, tax file number)
- ✓ Children's details (full names, date of birth, income, school attended)
- ✓ Bank details of you would like your refund paid directly into your bank account
- ✓ HELP (SFSS) loan details
- ✓ Medical expenses exceeding \$1500 (please supply Medicare number and individual reference number/s – we can obtain all information processed by Medicare)
- ✓ If we did not prepare your return last year, a copy of your last year's tax return or previous agent's information
- ✓ Education expenses for school children (textbooks, stationery, internet costs, computer equipment)

