



Hi,

Thank you for choosing us to for your tax preparation this year. To make the process as easy as possible for you I have prepared a checklist.

BEFORE YOUR APPOINTMENT

Please email the following information to admin@afaccounting.com.au

- Full Name (Including Middle Name)
- Date of Birth
- Tax File Number
- Address
- Postal Address (if different from above)
- Mobile Phone Number

BRING TO YOUR APPOINTMENT

General Information

- Private Health Insurance Details
- Bank Account Details
- Spouse Details
- Children's details including D.O.B and evidence of any Centrelink benefits
- Last Year's Income Tax Return (If you have it)
- Records of sales and purchases of any shares, business or property

Income

- PAYG Summaries
- Pensions or Government payments/ Allowances
- Interest earned for the relevant year from the banks, ATO or other
- Dividend Statements for dividends received or reinvested
- Annual Tax Statements from Managed Funds 5 April 2019

Other Income:

- Details of rental property income
- Details of any business income
- Foreign Income
- Capital Gains
- Employee Share Schemes

Expenses

Salary and wage earners and rental property owners will generally be entitled to an immediate deduction if certain income-producing assets costing \$300 or less are purchased before 1 July 2018.

Work Related Expenses

- Motor Vehicle Expenses Incl. estimation of Kilometres if no logbook kept, otherwise logbook and all expense items - note: you can NOT claim travel to and from work.
- Travel Expenses
- Work Related Clothing, Uniform & dry cleaning
- Investment Expenses For example: bank fees, financial advisors fees, investment borrowings etc.
- Work Related Expense for example: and repair expenses, telephone expenses, tools of trade, software, electronic tablets, stationery, education, fees etc.
- Rental Property Expenses For example: rates, body corp. fees, agent fees, interest on loan, repairs and maintenance, water rates, depreciation schedule, etc.
- Cost of managing tax affairs (prior year fees paid to a tax agent for your tax preparation)
- Charitable donations

If you have any questions feel free to contact me. Warm Regards

Alisha Fenn