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# INDIVIDUAL TAX RETURN CHECKLIST

**INFORMATION REQUIRED FOR COMPLETING TAX RETURNS**

Make sure you bring with you all the information needed for completing your tax return. This includes the following:

- PAYG Payment Summaries for wages, pensions and termination payments (ETPs);
- Interest received from savings & investments;
- Dividend statements (showing **dates paid** between 1st July and 30th June of the year being completed);
- Yearly summaries for other investments (e.g. managed fund or trust Annual Tax Statements, AMMA Statements or AMIT Statements)
- Details of investments (shares, real estate etc.) sold/purchased during the year (both sale/proceeds amounts received and original costs). This may also include share takeovers and restructures. *Note: the **contract date** is the relevant date for capital gains tax purposes (not the settlement date);*
- Details of Cryptocurrency capital gains or losses, (e.g. capital gains tax reports from crypto trading platforms or other external software providers);
- Details of work related expenditure;
- Private health insurance information (summary);
- Rental property information (**see additional rental information required**);
- The taxable income of your spouse / de facto, as well as the amount of any taxable and exempt government pensions, Reportable Fringe Benefit Amounts, Reportable Employer Superannuation Contributions, and net investment losses, if we do not complete their tax return.

***Please note that the list is a summary only and other information may be required.**

If you are not sure of what to bring along regarding your tax affairs please do not hesitate to contact our office.

**** Please note that other checklists are available on request or from our website. These include a 'Rental Schedule Checklist', 'Financial Account Preparation Checklist' and 'Superannuation Fund Account Preparation Checklist'.**