



QTAX CHECKLIST WHAT TO BRING?

INCOME - We now may be able to obtain some of these via the ATO portal!

- Payment Summaries
- ETP Payment Summaries
- Government Payments & Pensions
- Superannuation Payments
- Bank Interest Received
- Dividends from Shares
- Employee Share Scheme Statement
- Partnerships/Trust Income
- Managed Funds Tax Statements
- Personal Service Income & Expenses
- Business Income & Expenses
- Capital Gains Tax Information
- Purchase and Sale Records for Shares, Investment Property etc
- Foreign Income and Related Expenses
- Rental Property Income and Expenses
- Depreciation Report
- Any other Income Received

DEDUCTIONS

- Donations
- Last Years Tax Preparation Fee
- Work Related Car Expenses
- Work Related Travel - Overseas or Domestic
- Uniform with logo
- Self Education - Relevant to Your Occupation
- Seminars
- Tools and Equipment
- Telephone/Mobile
- Internet
- Subscriptions
- Union Dues
- Reference Books And Resources
- Sun/Weather Protection
- Superannuation Contribution (Your own not employer)
- Income Protection

OTHER THINGS TO BRING

- Tax File Number
- Bank Account Details
- Spouse's Taxable Income
- Tax Free Government Pensions
- Child Support Paid
- Prior Year Tax Return if you have it.

QTAX - *Tax Made Easy!*

13000 4 QTAX