

Income

Pay as you go (PAYG) payment summary
Details of any allowances not on PAYG payment summary (travel, laundry, car, phone etc)
Employment termination payment summaries
Australian Government PAYG payment summaries – New Start, Youth Allowance, ABSTUDY, Disability pension, age pension or other pension
Any other pension-like income streams e.g. Australian annuities and superannuation income streams
Interest received on all bank accounts
Dividend statements
Employee share scheme statements
Annual tax statements from managed funds
Trust distribution notices, declarations and tax statements
Rental property income and expenses (including loans, rates, insurance, agents statements etc)
Business income and expense records – e.g. MYOB, QuickBooks, Excel, Xero
Farm management deposits and repayments
Foreign source income – employment, interest, dividends, rental, pension

Capital Gains Tax and other important information

Shares – buy and sell contracts for any shares bought/sold
Purchase and/or sale contracts for investment properties bought or sold during the year
Purchase and/or sale settlement statements for investment properties bought or sold during the year
Private health insurance statement
Bank account details (for any refunds)

Deductions

Motor vehicle – work related expenses:
Diary records detailing Kms travelled for work/study/business related purposes or
Log book and car expenses – fuel, registration, insurance, maintenance or
Cost of car and acquisition date
Finance documents and/or loan agreements for any vehicles financed
Details of any travel for work specific purposes (not in a car)
Receipts for work related expenses e.g. uniform purchases, tools, union fees, phone, internet, subscriptions, journals and periodicals, stationary, seminars, computer etc
Did you undertake any study in relation to your employment to increase your income or skills? Please provide all costs and receipts
Loan interest for the purpose of receiving investment income including interest or dividends
Accounting fees you paid for last year's tax return
Donation receipts
Income protection insurance

Superannuation

Personal super contributions including date, amount and fund details.
Did you make any super contributions for your spouse?

Offsets and other information

Did you incur over \$2,300 of out of pocket medical expenses on Disability Aids, Aged Care or Home Attendant services? If so, please provide receipts or statements for the 2019 financial year.
Did you financially support a dependent who was genuinely unable to work due to invalidity or care obligations?
Did you live or work in a remote isolated area of Australia?
Did you serve overseas as a member of Australia's Defence Forces?
Did you receive any pensions which you do not pay tax on?
Have you paid any child support in the 2019 financial year? If so, how much?