

Tax return checklist

- Full name
- Tax File Number (TFN)
- Contact details: address, phone number, email
- Bank details: BSB, account number, account holder name, bank name
- Employment income
- Centrelink Payments
- Investment income: dividends, interest, rental income, capital gains, crypto currency
- Business income (if applicable): sales, expenses, invoices
- Work or study expenses (if applicable): receipts or records
- Private health insurance details (if applicable)
- Notice of intent to claim a superannuation deduction confirmation letter from your super fund
- Deductions: receipts or records for donations, work-related expenses, tax agent fees.
- Income protection statement showing deductible premium (if applicable)
- Foreign income (if applicable): details of income earned overseas
- Number of dependents (children)
- Taxable income of your significant other (if applicable)
- Rental property details (if applicable): rental income, expenses, loan interest, depreciation, etc.

If you're new to Ipsum we will also need:

- Identification such as a driver's licence
- Authorisation from the individual to act as their tax agent
- Copies of previous tax returns
- Any correspondence from the tax office

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IPSUM
ADVISORS