

My Tax Organiser



Name:

For Year to 30th June: My Consultant is:

RETAIN YOUR TAX RECORDS FOR 5 YEARS FROM THE DATE OF YOUR TAX ASSESSMENT

Details I Need To Bring

- Bank Details:
Acc No:
BSB:
Acc Holder/s:
- Details of any HECS / HELP debt
- Spouse income details
- Dividend & managed fund statements
- Private health insurance
- Superannuation deduction acknowledgement form
- Email address to receive a PDF copy of your tax return

My Income - Checklist

- Salary / wages / allowances / tips / honoraria
- Lump sum / eligible termination payments
- Comsec pensions / transition pensions
- Centrelink benefits / non exempt government pensions
- Interest & dividends
- Consultancy / contract income
- Partnership / trust distribution
- Business income (or loss)
- Capital gains / shares or rental property / crypto currency (including overseas property)
- Foreign income or pensions
- Rents
- Bonuses - life insurances etc.
- Other income - give details
- Capital gain on Australian property sold by non-resident
- Employee share scheme tax statement

My Deductions - Checklist

General Deductions

- Accountant / tax agent fees
- Travel to tax agent
- Books / magazines for work
- Clothing & uniforms - protective &/or employer branded
- Computers [% work related]
- Conferences / seminars
- First aid courses
- Gifts - prescribed charities
-DGR - school building fund
- Interest / dividend deductions
- Income protection insurance
- Lease payments
- Licences
- Motor vehicles - log book or kms
- Postage / courier costs
- Printing
- Registration fees
- Safety boots
- Sun protection
- Self-education expenses
- Stationery
- Subscriptions - membership
- Telephone / mobile phone
- Travel - parking, fares, meals accommodation & flights
- Tools / trade journals
- Union fees
- Working from home expenses

Rental Property Deductions

- Accounting
- Advertising
- Agent management fees
- Body corporate fees
- Borrowing costs
- Building construction write-off
- Cleaning
- Electricity
- Gardening
- Interest deductions
(NB: Keep loan statements)
- Investment advice expenses
- Insurances
- Land taxes
- Lease expenses
- Legal fees
- Management fees
- Pest control
- Postage & stationery
- Quantity surveyors report
- Rates - local council
- Rates - water
- Rent (tenant temp. accomm.)
- Repairs & maintenance
- Rubbish removal
- Telephone

58 Klingner Road
Redcliffe QLD 4020
T: 3883 8999

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**PLAN TODAY
FOR TOMORROW'S SUCCESS**

✓ **HOME LOANS & INVESTMENT LOANS,
PERSONAL LOANS & ALL ASPECTS OF
BUSINESS & EQUIPMENT FINANCE**
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Mick Doyle is credit representative 495495 of BLSSA Pty Ltd, ACN 117651760
(Australian Credit Licence 391237). Accountplan Finance Solutions Pty Ltd
(ABN 22 614 700 775) is credit representative 495434 of BLSSA Pty Ltd,
ACN 117651760 (Australian Credit Licence 391237).