

# 2025 Tax Checklist

Name of Taxpayer: \_\_\_\_\_

Address: \_\_\_\_\_

Preferred Phone: \_\_\_\_\_

Preferred Email: \_\_\_\_\_

Occupation: \_\_\_\_\_

## INCOME

- ☐ Payment Summaries & Income Statements
- ☐ Lump Sum & Termination Payment Summaries
- ☐ Government Payment Statements (If received)
- ☐ Interest from Banks & Building Societies
- ☐ Dividend Statements for Received/Reinvested Dividends
- ☐ Annual Tax Statements from Managed Funds
- ☐ Buy/Sell contract notes for share transactions
- ☐ Annual Tax Statements for Crypto

## DEDUCTIONS *(Work related expenses)*

- ☐ Vehicle Logbook for Motor vehicle expenses
- ☐ Travel (fares & accommodation)
- ☐ Uniforms/Workwear
- ☐ Self-Education & Professional Development
- ☐ Union, Registrations, Tools, Subscriptions, Memberships
- ☐ Home Office No. of hours worked from Home
- ☐ Seminars & Conferences
- ☐ Telephone, Computer, Internet
- ☐ Any other costs incurred earning income
- ☐ Donations to Charities or Building Funds
- ☐ Income Protection Insurance
- ☐ Receipts for Rapid Antigen Tests
- ☐ Acknowledgement to claim Tax Deduction for Personal Contributions from your Super Fund

## OTHER INCOME

- ☐ Rental Properties
- ☐ Business
- ☐ Foreign Income
- ☐ Capital Gains
- ☐ Employee Share Schemes

## OFFSETS & REFUNDS

- ☐ Health insurance & rebate entitlement statement
- ☐ IAS statements or details of PAYG instalments paid
- ☐ Spouse details including taxable & exempt income

## TAX REFUNDS

Remember to bring your bank account details, including the BSB and account number with you to your appointment. You can also take advantage of our Fee from Refund service if you receive a refund.

## NOTE

A tax deduction is:-

- An expense you have paid and have not been reimbursed for
- Directly related to your income
- You have proof of your expense (Receipt/substantiation)

**Have any Questions?** Don't hesitate to call us on **(08) 8224 0066**