



Simpro Taxation Services

U14/910 Albany Highway, EAST VICTORIA PARK WA 6101

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TAX RETURN CHECKLIST

GENERAL

- Driver's License
- Bank Account Details (BSB, Account Number, Name of Account Holder)
- Private Health Insurance Tax Statement
- Copy of Last Tax Return Lodged

INCOME

- PAYG Summaries / Group Certificate
- Pensions or government & Centrelink payments/allowances
- Interest earned
- Dividend statements
- Details of any other income earned

DEDUCTION

- Work related expenses including:
 - Uniforms
 - Tools and equipment
 - Union / Professional Membership fees
 - Mobile phone and Internet
 - Home office
 - Training/ work related studies expenses
 - Printing and stationery
 - Company and accessories
 - Other work related expenses
- Work related Motor Vehicle expenses
 - Kilometer travel or
 - Log book records with all receipts and invoices
- Travel expenses
- Investment expenses (For example: bank fees, financial advisors fees etc.)
- Income protection insurance premium
- Charity donations
- Cost of managing tax affairs

*Please note the above items are only the basic requirements, We will contact you if further information Required.

Professional, We make it simple for you...