BROADLEY & HAYDON

CHARTERED ACCOUNTANTS

ABN 32 691 683 140

BASIC CHECKLIST – Individual Tax Returns (Non Business)

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- ☐ All Payment Summaries from employer and Centrelink for the whole year.
- ☐ Any interest earned on Individual & Joint Bank Accounts for whole year.
- ☐ Private Health Insurance Statement for year (issued by Health fund after 30/6)
- ☐ Spouses Taxable Income for the year (if not done by our firm)
- ☐ All Dividend Advices (cash & reinvestments) for all shares held. Usually two or three for each investment.
- ☐ Contracts for any Shares sold and details of the original purchase cost/date.
- ☐ All work and investment related expenses paid during the year.
- ☐ Any Managed Fund Statements with Annual Tax Summary

If you have a rental property, you will need the following:

- ☐ Details of Income (usually annual statement from the agent)
- ☐ All expenses in the year and capital improvements e.g. construction etc
- ☐ Loan Account Statements from 1st July – 30th June of the year

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If you are a new client, you will also need the following:

- ☐ TFN (Tax File Number), Date & Place of Birth)
- ☐ Full Name and Address
- ☐ Copy of prior year Tax Return and notice of assessment is desirable
- ☐ Copy of prior year Depreciation Schedules (if applicable)
- ☐ Details of all Dependants (Names & Ages)
- ☐ Tax Return Fees paid last year (so we can claim this year)

***Please bring this checklist along with you to your appointment**