



Advice that Works

Information	Information Provided	N/A
Income		
<i>If they were issued:</i> PAYG summaries from employers (including employee share schemes) and/or superannuation funds	•	•
Lump sum payments (eg Employment Termination Payment)	•	•
For new clients – a copy of last year’s filed tax return and rental property depreciation reports (if so)	•	•
Managed fund annual tax statements and capital gains tax statements	•	•
Partnership or Trust distribution statements, including a copy of the partnership's/trust tax return	•	•
Dividend (and Dividend Reinvestment) statements	•	•
Annual Bank statements - detailing year end interest earned	•	•
Term deposit statements detailing year end interest earned	•	•
Buy/sell details for Shares & Crypto transactions	•	•
Work-related Deductions		
Details of items bought during the year (e.g. laptops, printers, phones, briefcases etc)	•	•
Professional journals/magazines/memberships/subscriptions	•	•
Home Office/Internet/Phones/Mobile etc (<i>rules have significantly changed in 2023 – refer tax tips newsletter</i>)	•	•
Receipts for continuing professional development / seminars or for overnight or interstate work travel	•	•
Receipts for self-education expenses	•	•
Receipts or evidence of work-related deductions such as protective clothing & uniform expenses	•	•
Vehicle logbook for motor vehicle expenses (or km estimates) we can discuss this further at CIA tax if unsure.	•	•

Other Deductions		
Receipts for donations of \$2 and over to registered charities	•	•
Expenditure incurred in managing tax affairs (e.g. tax agent's fees)	•	•
Expenditure incurred in earning investment income (loans etc)	•	•
Income protection insurance premiums	•	•
Personal super contributions made that are to be claimed as a deduction (note we will need notice of intent to claim confirmation)	•	•
Rental Properties		
Annual statement from property agent (if engaging the services of an agent)	•	•
Date of when property was purchased (if newly acquired)	•	•
Details of property repairs bought or disposed during the year	•	•
Expenses (which are not detailed on the property agent annual statement) incurred, such as water charges, land tax and insurance premiums	•	•
If property is held by more than one individual, details of owners and their legal ownership percentage	•	•
If property was disposed of during the income year, information relating to dates and costs associated with the acquisition and disposal of the property	•	•
Loan statements for property showing interest paid for the income year	•	•
Depreciation Reports (only needed to be supplied once)	•	•
Records / Summary detailing rental income and expenses (if not engaging the services of a property agent)	•	•
Offsets / Rebates		
Details of any superannuation contributions for spouse	•	•
Details of dependants, including their age, occupation and income	•	•
Private health insurance statement (if insurance is held with partner, please state who is the primary holder and provide the age of partner)	•	•
Other Information		
Copies of Instalment Activity Statements PAYG lodged	•	•
Any doubts about any income or expense you have received or incurred, bring the documents in with you!	•	•
CIA 'tip': Review your last year's tax return for reminders and prompts on what you should be bringing with you!	•	•