

## Tax Appointment Preparation Checklist

### Income

- Interest received from bank accounts
- Dividend Statements (including those for reinvested dividends and shares sold)
- Managed funds annual tax statements
- Cryptocurrency income details
- Superannuation payment summaries
- ABN income and expenses
- Income from partnerships and trusts
- Rental property income and expenses
  - Annual real estate statement
  - Loan statements
  - Council rates/water
  - Body corporate notices
  - Insurance
  - Pest control
  - Repairs, renovations, replacements
- Sale and purchase paperwork for real estate, cryptocurrency, shares, managed funds

### Deductions

- Motor vehicle logbook & receipts for fuel, insurance, registration & servicing etc.
- Receipts for work related expenses & donations
  - Uniforms
  - Stationery
  - Laptop
  - Training
  - Union
  - Tablet
  - Mobile
  - Tools
- Professional Registrations
- Income protection policy letter from insurer stating deductible amount

### Other

- Personal superannuation contributions documentation
- Child support you paid
- Taxable income for dependent children

### Additional Information Required

Taxable income	\$
Reportable fringe benefits	\$
Reportable super contributions	\$
Australian government pensions	\$
Taxable	\$
Exempt	\$
Net investment losses	\$
Rental property losses	\$
Child support paid	\$

### Bank Account Details

BSB \_\_\_\_\_  
Account No \_\_\_\_\_  
Account Name \_\_\_\_\_

Appointment Date: \_\_\_\_\_

Appointment Time: \_\_\_\_\_

#### TAX TIP

Cryptocurrency is on the ATO Audit Hit List this year. Make sure you include all trades and obtain a capital gains statement.

Book your appointment online!

[www.concord.tax](http://www.concord.tax)