

To maximise your deductions and ensure that your tax return is complete, please review the following items and advise your Accountant if any apply to you.

**Income**

[ ]  Employment Income (salary / wages)

[ ]  Allowances / Tips / Director’s Fees

[ ]  Employer Lump Sum Payment

[ ]  Employment Termination Payment (ETP)

[ ]  Centrelink / Pension Income

[ ]  Annuities / Superannuation Lump Sum Payments

[ ]  Interest Amounts & TFN Credits

[ ]  Dividends, Imputation & TFN Credits

[ ]  Employee Share Schemes

[ ]  Partnership & Trust Distributions

[ ]  Business Income

[ ]  Capital Gains/Losses

[ ]  Foreign Income

[ ]  Rental Property Income

**Other Items to Consider**

[ ]  HELP (Higher Education Loan Program) / HECS

[ ]  SFSS (Student Financial Supplement Scheme)

[ ]  Child Support Agency Liability

[ ]  Net Medical Expenses Offset

[ ]  Health Insurance Statement

[ ]  PAYG Instalment Credits

[ ]  Other Offsets & Tax Credits

[ ]  Reportable Fringe Benefits amount

**General Tax Deductions**

[ ]  Work Related Motor Vehicle Expenses *(Log
 Book may be required)*

[ ]  Work Related Travel Expenses *(Travel Diary may
 be required)*

[ ]  Work Related Clothing & Laundry Expenses

[ ]  Work Related Self-Education Expenses

[ ]  Other Work Related Expenses *(see below)*

[ ]  Interest & Dividend Deductions

[ ]  Gifts & Donations

[ ]  Tax Related Expenses *(Includes tax agent fees, and
 travel to tax appointment)*

[ ]  Undeducted Purchase Price-Pension / Annuity

**Specific Deductions**

[ ]  Income Protection Insurance

[ ]  Union Fees

[ ]  Home Office Expenses

[ ]  Seminars / Courses / Conferences

[ ]  Overtime Meal Expenses

[ ]  Briefcase

[ ]  Tools & Equipment

[ ]  Depreciation on work-related assets

[ ]  Calculator / Electronic Organiser

[ ]  Computer Costs *(includes repairs & printing costs)*

[ ]  Software

[ ]  Memberships & Subscriptions

[ ]  Telephone / Mobile Phone / Internet

[ ]  Bank Fees *(e.g. re: deductible purchases)*

[ ]  Interest Expenses *(e.g. re: deductible purchases)*

[ ]  Sun Protection Items *(e.g. sunscreens, safety
 glasses, protective gloves)*

[ ]  Reference Books / Journals / Trade Magazines

Talk to us TODAY for expert assistance to prepare your Tax Return and maximise your tax refund!

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