

## **Tax time checklist**

### **Items to help prepare for tax time**

Lodging your tax return is easier when you have everything ready that you will need. Be prepared this tax time:

- Tax file number.
- bank details (BSB and account number) to receive any refund owed.
- Medicare card or number.
- Details of you income and expenses which could include:
  - details from payment summaries from employers, super funds, Centrelink or Department of Veterans' Affairs.
  - statements from banks and financial institutions showing interest received.
  - details of foreign pensions or other foreign income received.
  - employment termination payment summaries.
  - receipts for gifts, donations and work-related expenses.
  - details of any child support payments made.
  - If you have a spouse, you will need to supply details of their income.

**Investments** - If you have shares, units, managed funds or other investments you will need details of:

- dividend payments and distributions from managed funds.
- any investment gains or losses from the disposal of shares, units and rental properties.

**Rental properties** - If you own a rental property you will need details of:

- rental income earned.
- interest charged on money you borrowed for the rental property.
- other expenses relating to the property, including any expenditure on capital works.