

Tax Return CHECKLIST



GENERAL DOCUMENTS

- Tax File Number & Photo ID
- Payment Summaries from Employer(s)
- Work-Related Receipts & Expenses
- Private Health Insurance Statement
- Spouse Date of Birth & Income Details
- BSB & Bank Account Number
- Centrelink / Superannuation Payment Summary

INVESTMENTS & BUSINESS

- Bank Interest Summary
- Share Dividends & Employee Share Scheme
- Investment Property Info - See Checklist
- Sold Shares / Investment Property - See Checklist
- Business Income & Expenses - See Checklist

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