Here's a list
of some of the things
you may need to have ready!

INDIVIDUALS - SALARY & WAGE EARNERS

ARE YOU PREPARED TO DO YOUR TAXES?

REQUIRED DOCUMENTS

In order for Taxwise to accurately prepare your tax return it is necessary you have all supporting documentation available at your appointment, such as payment summaries/ group certificates, statements, invoices or receipts. We accept paper and electronic copies as long as they are clear and easy to read.

INCOME

- ☐ PAYG Payment Summaries
- ☐ Investment Income Records
  - o Interest received on your bank account(s)
  - o Dividends received on shares
- ☐ Foreign Income
- ☐ Rental Investment Income - *Refer to Rental Property Preparation*

EXPENSES

- ☐ Computer costs
- ☐ Courses, seminars & workshops
- ☐ Donations
- ☐ Internet usage
- ☐ Logoed uniforms or protective clothing
- ☐ Mobile & telephone costs
  - *- If prepaid, all receipts required*
- ☐ Motor vehicle expenses
  - o Fuel
  - o Registration & Insurance
  - o Repairs & Maintenance
- ☐ Professional registration fees
- ☐ Self-education fees - *Course has to be directly related to your work activities*
- ☐ Stationery
- ☐ Sun protection costs
- ☐ Tools & equipment
- ☐ Trade journals, books & publications
- ☐ Travelling expenses
- ☐ Union fees ...
- ☐ All other items you may consider to be necessary that is directly related to your current work activities.

Any Questions?
Call us on (08) 9248 8124