

TAX CHECKLIST

2022 Shares & investments

INCOME:

- Salary or Wages *(This will be reported directly to us, so no need for a payment summary)*
- Australian Pensions or Annuities (including superannuation)
- Bank Interest earned *(This will be reported directly to us)*
- Information for Shares (refer to shares and investment checklist)
- Managed Fund Investments (annual tax statement required)
- Capital Gains from investments such as shares or **Crypto Currency** (buy and sell statements) or property (purchase and sale contracts, legal and agents fees paid)
- Rental Property – annual income (statements from real estate agent)
- Distribution from a family Trust or Partnership
- Foreign Income or Pensions

DEDUCTIONS:

- Car expenses – estimated total kilometers travelled or logbook and total expenses for operating your vehicle. (e.g., Fuel, Repairs, Insurance, Registration)
- Work related travel expenses (e.g., accommodation, airfares, taxi fares or meals)
- Uniform expenses (e.g., protective clothing and uniforms purchase or dry-cleaning receipts)
- Self-Education expenses relating to work (e.g. fees, books, stationery, or travel)
- Home office costs relating to work – total hours worked, phone, computer, and software
- Professional membership, subscriptions, and union fees
- Seminars and Conference costs
- Interest expenses on monies borrowed for investments (shares, managed funds)
- Donations to registered charities
- Income Protection Insurance
- Rental Property – Refer to Rental Property Checklist
- Concessional Super Payment *(With notice of intent to claim)*

TAX OFFSETS:

- Annual tax statement for private health cover *(This will be reported directly to us)*
- Superannuation contributions to your spouse's fund

Once you have all your documents and would like us to prepare your 2022 Individual Tax Return, please contact our office: