



General Common Information Required for the Completion of Income Tax Returns

- Tax File Number
- Date of Birth
- Current Address
- Bank Account Details (in the event of a refund)
- Pay As You Go Summaries (formerly Group Certificates)
- Details of interest earned from banks and other establishments
- Details of dividend, trust and managed funds income
- Rental Property Information
- Information on the sale of any capital item (including shares)
- Business information
- Information on any other income from other sources
- Details of any expenses incurred in the performance of work (including receipts)
- Cost of completion of tax affairs in the tax year
- Gifts & donations to Deductible Gift Recipients
- Expenses relating to investment income earning
- Private Health Insurance Annual Statements

This is not an exhaustive list, but will cover the majority of individual tax returns. Any further information required to complete your return will be requested at the time of your appointment.