

Income

- Income Statement – we can generally access these details
- Government Pensions, Payments & Allowances – we can generally access these details
- Eligible Termination Payment Statements - usually received on retirement or redundancy
- Interest Received on Bank Accounts
- Dividends Received - including dividends reinvested (usually 2 per year)
- Any claims made on an Income Protection or Sickness & Accident Insurance
- Documentation relating to any assets purchased or sold, for example
 - shares, including *any* correspondence regarding any share transactions including sale, takeover, merger, demerger, etc
 - vacant land
 - house or other assets received from an estate
 - house (including own residence)
 - works of art, collections
 - assets received through a divorce settlement

Deductions

- Work Expense receipts or other evidence for expenses including:
 - Car Expenses (logbook required or diary entries showing no. kms travelled**)
 - Union Fees
 - Registration & Subscription Fees
 - Uniforms, Protective Clothing & Laundry**
 - Tools of Trade, etc
 - Sunscreen, Sunglasses & Hats
 - Home Computer / Internet / Phone (should have a log showing use)
 - Home Office (should have diary entries recording hours worked at home***)
- Donations - including school building fund & payments included on electricity bill
- Accountants Fees paid last year
- Any Income Protection Insurance or Sickness & Accident Insurance paid
- Letter from superannuation fund confirming you are claiming a deduction for contributions

2020/21 Year only

** These claims should be reduced if you were required to work from home due to Coronavirus lockdown

*** Special rate of 80 cents per hour for each hour you work at home for the period from 1st July 2020 to 30 June 2021 only

Other

- Seniors & Pensioners Tax Offset (SAPTO) - if your spouse/partner is 60 years or older, require their taxable income
- Health Insurance - letter from insurer (eg: BUPA) about contributions made -- we can generally access these details
- Spouse Superannuation Contributions - amount of superannuation paid, name of superannuation fund & member number
- Zone Offset - children's full names, dates of birth & any income they may have earned
- Amount of Child Support paid
- Bank Account details for possible refund including BSB, Account Number & Account Name