Moreton Bay Tax & Bas Pty Ltd

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What to bring . . .

Income

- PAYG Payment Summaries or Income Summaries available on Online Services for Agents
- Gross Salary, Wages, Allowances, Benefits, Earnings, Tips and Directors Fees
- Interest and dividends received and any tax deducted. Include details of franked dividends (imputation credits).
- Government payments, including pensions, unemployment and sickness benefits.
- Annuities, including allocated pensions or superannuation income streams.
- Lump sum and termination payments. All documentation should be provided including an ETP Payment Summary from the employer or fund.
- Details of any CGT asset sales (e.g. shares and real estate). Please include dates of, and costs associated with, acquisition and disposal.
- Income from managed funds, cash management trusts. Tax Statements of distribution should be provided where appropriate.
- Income from Business Activities - Sole Trader, Partnership, Trust or Company
- Rental income.
- Foreign source (employment and pension) income and details of any foreign tax credits.
- Employee share scheme interests
- Details of any non-cash benefits received including discount(s) on employee shares or rights.

Deductions

- Bank fees (where the credit or deposit represents assessable income)
- Donations of $2 and over
- Tax Agent Fees and other accounting / tax audit fees
- Subscriptions (not including sporting or social clubs).
- Employment related expenditure such as work-related motor vehicle, self-education, protective clothing, tools, uniform, travel, union, journals, seminars, sun protection and laundry expenses. Work-related car expenses require a logbook record for travel more than 5,000 kilometres.
- Home office expenses where employment requires use of your computer, phone or other device.
- Investment and property expenses including depreciation reports or schedules.
- Income protection Insurance premiums.
- Details of any or additional personal superannuation contributions made.
- Special deductions (Australian films, investment shelters and agribusiness-type schemes).

Other

- Private health insurance annual tax statement
- Any changes in dependents including children's details, dates of birth and any Centrelink benefits applicable.
- The taxable income of your spouse
- Details of any remote area work performed for 183 days or more.
- HECS-HELP Debt details - this will be available on Online Services for Agents

New Clients

- Your tax file number, last year's Notice of Assessment and Tax Return (if available).
- Bank details - BSB and Account number
- Photo ID
- Any additional information that could be relevant to your tax situation this year, if you are unsure bring it anyway

 # In the interests of protecting client data and systems we are unable to accept information via USB