



Tax Checklist

Details that we can cross reference with ATO data matching:	
Income Statement (Group Certificate)	
Bank interest earned	
Dividend statements	
Employee share scheme statements	
Tax statements for managed funds	
Private Health Insurance payments & rebates	
REQUIREMENT	PROVIDED
Details that you will need to provide and have evidence for:	
Work related expenses (eg motor vehicle, travel, uniform, tools)	
Self-education expenses	
Donations to registered charities (\$2 and over)	
Income protection payments	
Home office expenses (generally based on number of hours worked from home)	
Details of depreciable assets brought during the year, e.g. laptop	
Details of any investment loans	
Spouse details, including taxable income	
Details of dependent children, including date of birth	
Details of any crypto purchases/sales (eg Bitcoin)	
Additional Super contributions, including your notice of intent to claim from your super fund	
Any income derived from the "share economy" (eg Uber driving, AirBnB, Airtasker)	
Documentation re foreign source income, foreign assets or property	
Dividend statements	
Managed fund annual tax statement and capital gains tax statement	
Buy & sell contract certificates for shares (if any shares were sold)	
Details for any investment properties that you own, including:	
Rental property statement from real estate including period was rented during year	
Details of any rental property expenses not covered by the above	
Details of any capital works or additions on the property	
Purchase and sale details including the purchase and sale documents, solicitor fees, settlement sheets, agents commission and advertising, etc	
Sole Trader details to provide:	
Cashbook, which includes records of drawings taken before the business takings were banked	
Business Activity Statements lodged (if not prepared by Figtree Group)	
PAYG summaries/income statements for employees	
Government grants, rebates or payments received	
Superannuation contributions for employees	
Notice of superannuation contributions for self-employed persons including notice of intent to claim from the super fund	
Payments of salaries and superannuation to associates	
Assets purchased, including date of purchase and amount	
Statements of all liabilities of the business	
Records from accounting software (eg trial balance, profit and loss, and balance sheet)	