

# TAX ESSENTIALS CHECKLIST

Hannans360° want to make tax time a breeze for you

## WHAT WILL I NEED

- Driver's Licence or other photo identification
- Bank Statements and/or bank details for your refund
- Income and deduction information as per checklist
- Tax File Number (TFN)

## INCOME & DEDUCTIONS CHECKLIST

### Income

- Payment Summaries and Income Statements
- Lump Sum and Termination Payment Summaries
- Government Payment Statements (if applicable)
- Interest Income from banks and building societies
- Dividend Statements for Dividends received or reinvested
- Annual Tax Statements from Managed Funds

### Other Income

- Rental Properties (including Airbnb, Stayz, etc)
- Business (including sharing economy income, e.g., Uber, Airtasker)
- Foreign Income
- Capital Gains (including cryptocurrency gains)
- Employee Share Schemes

### Deductions (work related expenses)

- Motor Vehicles
- Travel (fares and accommodation)
- Uniforms/Workwear
- Union, Registrations, Tools, Subscriptions and Memberships
- Self-education
- Professional Development, Seminars and Conferences
- Working from Home, including telephone, computer and internet
- Any other costs incurred earning income
- Donations to charities or building funds
- Income Protections Insurance

### Offsets and Refunds

- Health Insurance and Rebate Entitlement Statement
- IAS Statements or Details of PAYG Instalments Paid
- Spouse Details including taxable and exempt income