Tax Preparation Checklist

Income	✓
PAYG Payment Summary	
Allowances (Youth, Newstart)	
Interest Received – Financial year interest summary from institutions	
Dividends Received	
Managed Investments (Tax statement)	
Family Trust Distributions	
Locum and Private Income (Invoiced using ABN)	
Foreign Income	
Rental Income (From Investment Property)	
Capital Gains	
Cryptocurrency	
Deductions	✓
Car Travel (Work related kilometres travelled or logbook)	
Other Travel	
Clothing (Protective, Uniform or Occupation Specific, Laundry)	
Education Expenses (Exams, Fees, Travel)	
Professional Subscriptions (AHPRA, AMA, RACS, RACP etc.)	
Indemnity Insurance	
Conferences & Professional Development (Reg'n, Travel, Accom'n, Food)	
Reference Books and Journals	
Mobile Phone (Usage costs x Business Use %)	
Internet (Usage costs x Business Use %)	
Home Office (Avg hours working at home p/w)	
Stationery, Postage, Printing, Photocopying	
Computer Equipment (Hardware and Software)	
Equipment (Desk, Bookcase, Chairs, Briefcase, Tools of trade etc) (>$300 Deprecation)	
Donations	
Tax Agents Fees	
Income Protection Insurance	
Interest and Bank Charges (On Investment Borrowings Accounts)	
Other	✓
EFT Details for Refunds (Account Name, Account No, BSB)	
Private Health Insurance Statement	
Spouse Details (Name, DOB, Taxable Income)	
HECS/HELP Debt	
Non-Permanent Resident Info	✓
Passport	
Visa (hard or electronic copy)	

BBB Partners
Accountants & Wealth Advisors

Level 8, 60 Albert Road
South Melbourne, Victoria 3205
Phone: (03) 9693 7777
Email: contactus@bbbpartners.com.au
bbbpartners.com.au