

# Information Required For Tax Return Preparation



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Tax agent  
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## Income

As an Australian resident you must declare income from all sources, in and out of Australia. Some examples may include:

## Employment

- PAYG Payment Summaries (Group Certificates/STP Finalisation)
- Any additional allowances, tips etc not noted in a group certificate
- Lump Sum Termination Payments
- Labour Hire/Personal Services Income Summaries
- Employee Share Schemes

## Pensions & Superannuation

- Superannuation Lump Sum & Pension Payments
- Pensions/Government Payments
- Pandemic leave payments from the Government

## Interest & Dividends & Distributions

- Interest earned
- Term deposit interest
- Dividend slips
- Annual Tax Statements (provided between August and October) for Exchange Traded Funds (ETF's), Private Trusts/Managed Funds/Stapled Securities & Partnerships

## Capital Gains Events

- Purchase/Sales contracts for Shares, Trusts, Partnerships, Land and Managed Funds
- Cryptocurrency (capital gains summary such as "Koinly" for all wallets)
- Purchase/Sale contracts & settlement statements for Real-estate (where you have owned multiple properties at the same time, or where it has not been your main residence for 100% of the time)
  - Details on dates it was your main residence
  - Valuation of property at date it ceased being your main residence
  - Costs for building the property where applicable
  - Costs for other significant improvements to the property



ACCOUNTING



FINANCE



BOOKKEEPING



SMSF



TAXATION

- Where land only or house that has never been rented (and not your main residence), rates and taxes & interest incurred on the property since purchase
- Details on other property ownership (dates of purchase/sale and if any main residence exemption was claimed on this)

## Rental Properties

- Purchase documentation, including contract of purchase and settlement statement
- Property Manager Annual Summary and/or
  - Rental income
  - Bank Loan Statements & Loan establishment fees/documents
  - Land Tax, Council Rates, Body Corporate Fees (Strata fees), Water Rates & Usage & Insurances
  - Repairs, Pest Control, Gardening & Cleaning
  - Advertising & legal fees
  - Depreciation report (if available – or contact us to discuss or visit [www.deppro.com.au](http://www.deppro.com.au))
  - Details and costing of any capital expenditure related to improvements and additional assets
  - Any other rental related income/expenses

## Overseas

- Any overseas income, or overseas interests, including pensions

Should you have any queries in relation to any of these items, please do not hesitate to contact the office on 9452 0071, or via email at [tax@spenceraccountants.com.au](mailto:tax@spenceraccountants.com.au).

## Bonus For Recommendations

We think we provide a great service, and we hope you do to. We love nothing more than having you show us this by telling your friends and family about us and recommending they use our services.

When your friend or family advises us that you recommended us, we provide a credit on your account equal to 10% of their fee for you to use next time you use our services. It is our way of saying thank you for the acknowledgement and helping us to grow our business.

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