Ascend Financial Management Pty Ltd

# What to bring to your tax appointment

- Your most recent tax return & Notice of Assessment (new clients only)
- Payment summaries for salary & wages
- Centrelink payment summaries
- Payment summaries for superannuation income streams, other pensions and superannuation lump sum payments
- Private Health Insurance statement
- Bank statement confirming interest earned during the year
- Dividend statements
- Details of investment assets sold, eg. shares or real estate
- Donations receipts
- Car log book or diary, or estimate of work kilometers
- Rental properties—income & expenditure details, most recent depreciation schedule
- Business income & expenditure
- Receipts for work related purchases—eg. car expenses, protective clothing/uniforms, sun protection, self education, home office, telephone, internet, tools of trade.
- Bank account details for your refund
- Spouse details (date of birth, taxable income, fringe benefits, reportable superannuation contributions)
- Any other information you may consider relevant

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## Ascend Financial Management

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