

END OF FINANCIAL YEAR – TIPS

1. GENERAL INFORMATION

- PAYG Payment Summary
- Interest income from banks and building societies
- Donations to charities
- Health insurance rebate entitlement
- Commonwealth assistance notices

2. SHARES, INVESTMENTS AND RENTAL PROPERTIES

- Dividend statements for dividends received
- For share sales and purchases, the purchase and sales contract notes
- Tax statements of managed funds
- Solicitor's correspondence for the purchase and sale of real estate
- Rental property statements and details of other expenditure incurred

3. EXPENSE DETAILS

- Work related expenses
- Self-education expenses
- Travel expenses
- Medical expenses (if related to disability aids, attendant care or aged care)