



## What to Bring to Your Appointment

Below is a list of the information you should bring with you when meeting to have your tax return prepared.

*For your 2011 tax return, all information should be for the period **1 July 2010 to 30 June 2011.***

### Income

- PAYG Payment Summaries from each employer
- PAYG Payment Summaries from Centrelink
- Lump sum and termination payments
- Bank interest earned on each bank account
- Foreign income

### Deductions

- Receipts for work related expenses or a summary of those expenses
- Work related kilometres travelled where total is less than 5,000km.
- Log book for work related motor vehicle expenses where work related travel was greater than 5,000km
- Self education expenses in excess of \$250 including related travel
- Receipts for donations

### Investments

- Dividend statements, including where dividend are reinvested
- Tax statements from managed funds
- Employee option or share scheme documentation
- Interest charged on margin loans and other investment loan products.
- Details of any shares or investments purchased or sold

### Rental Properties

- Agent's annual statement or summary of income received
- Details of any costs incurred for the property paid by yourself (not by the agent from the rent they hold)
- Depreciation reports, if available
- Loan statements



### Other

- Last year's tax return (if you are a new client)
- Spouse Income – if return not being completed at the same time
- Private health insurance, including membership number and level of cover
- Education expenses for Primary and Secondary school children, subject to eligibility – refer to "Education Tax Refund Information"
- Medical expenses in excess of \$2,000 for whole family, after any reimbursements
- BSB and Account Number if you want your refund deposited into your bank account.

Kindly note that payment is required before lodgement of any tax returns. Payment methods accepted are cash, cheque, bank deposit, Visa and MasterCard.

**Call Sapphire Accounting & Taxation today on 02 8831 8373 to make an appointment at a time that's convenient for you.**